

AMENDMENT NO: 6

APPENDIX B TO ANNEX A TASK AUTHORIZATION FORM

TASK AUTHORIZATION (TA) FORM			
Contractor:	DELOITTE INC.	Contract Number:	B9220-210014/001/ZM
Commitment Number (PR#):	153079	Financial Coding:	0500-0140-6762-54080-9220-9998
Task Number:	7113302 TA 01	Amendment Number:	006
Issue Date:		Response required by:	

1. STATEMENT OF WORK (WORK ACTIVITIES, CERTIFICATIONS AND DELIVERABLES)

NEW
 Amendment #006 is raised to:

- Amend the Deliverable/Milestones for Workstream 1 - Digital Service Response
- Increase the value of the TA by \$235,000 (exclusive of tax) for new Deliverable/Milestone

NEW
 Amendment #005 is raised to:

- Amend the Description of the Project/Work required for the Innovation & Experimentation Workstream
- Revise deliverables and respective schedule for the Innovation & Experimentation Workstream
- No change to TA value

NEW
 Amendment #004 is raised to:

- Extend Deloitte services to deliver Change Management support against the TA01 for the Transformation Change Management Office (TCMO)
- Increase the value of the TA by \$175,760.00 (exclusive of tax) in new Deliverable/Milestones for Workstream 4 – Change Management

NEW
 Amendment #003 is raised to:

- Amend the Description of the Project/Work required (highlighted in yellow)
- Revise deliverables and their respective schedule

Amendment #002 was raised to:

- Amend the Description of the Project/Work required
- Extend the end date of the TA
- Increase the value of the TA by \$2,500,000.00 plus \$374,375.00 in applicable taxes for a total increase amount of \$2,874,375.00
- Add a Milestone/Deliverable and revise existing Milestones and their respective schedule.

Amendment 002 focuses on the Digital Services Response work stream and includes several work packages to achieve the overall objectives to satisfy Ministerial commitments for the PR file and continue to enable IRCC to respond to the ongoing pandemic pressures

Amendment #001 was raised to:

Revised Delivery Weeks for the following Work Streams

- **Risk Advisory Services (RAS)**
- **Technology Advisory Services (TAS)**
- **Change Management (CM)**
- **Innovation and Experimentation (IE)**

New and Revised content to Section 1. Statement of Work for the following areas:

- **Change Management (CM)**

Description of the Project / Work Required:

Digital Service Transformation- Emergency Response to COVID-19

Immigration, Refugees and Citizenship Canada (IRCC) is seeking the services of a global organization(s) (the "Contractor") with expertise in rapidly developing and implementing Digital solutions and supporting technologies in response to the recent global pandemic. COVID-19 has increased the urgency for IRCC to develop updated (i) new strategies, and (ii) processes and digital systems to cope with the rapid change it is undergoing. These include updating systems and processes for internal staff, re-thinking and re-designing how IRCC provides its services to its clients within Canada and around the world, leveraging digital processes wherever possible thus minimizing the need for in-person interaction or paper-based processes for the safety of IRCC's staff, clients and community.

The scope of this Task Authorization is to work with IRCC to support this Digital Services Response project through several complementary work streams. This includes the execution of critical activities in a timely and efficient manner by leveraging leading practices and advanced technologies.

This Task Authorization has five primary work streams to achieve the overall objectives for the CIO Organization:

- **Digital Services Response**
- **Risk Advisory Services**
- **Technology Advisory Services**
- **Change Management**
- **Innovation and Experimentation**

The focus of Amendment 02 is on the Digital Services Response work stream and includes the following work packages to achieve the overall objectives to satisfy Ministerial commitments for the PR file and continue to enable IRCC to respond to the ongoing pandemic pressures:

- **Digital Services Support Model**
- **Digital Services Response: PR Confirmation**
- **Digital Services Response: PR Intake**

Background

On March 11, 2020, the World Health Organization (WHO) declared the newly discovered Corona virus (COVID-19) as a global pandemic. With COVID-19, rapidly spreading and creating serious health threats across the globe, citizens, businesses, and governments are significantly disrupted creating an unprecedented economic impact.

The Government of Canada has taken unprecedented action in an effort to slow the spread of this virus. It has implemented significant international travel restrictions, significantly reduced in-person interactions with Government personnel, recalled citizens and staff from abroad and implemented strict guidelines for physical distancing and remote working. IRCC provides a critical array of services in support of temporary residents (temporary foreign workers, international students and visitors), permanent residents, citizenship seekers, refugees and asylum claimants and directly to Canadian citizens for passports and other travel documentation. Many of the above programs are currently supported by in-person or paper-based processes. Those processes that do include some automation are supported by aging IT systems that are not readily able to be adapted to support this new way of working or at the pace of change required to respond to the rapidly evolving response to the COVID-19 emergency...

Success requires establishing a rapid capacity for change through immediate actions. Digital services strategies are required to facilitate a simplified, digitally enabled experience to improve productivity, while providing for new digital channels that will empower clients and applicants to carry out quicker processes easily, securely and conveniently.

TASKS

Digital Services Transformation

The Digital Services response objective is to support IRCC in reducing the backlog and pressures on Immigration Services. The Contractor and IRCC will work as an integrated team to create simple and easy digital solutions across the application process for all types of visa applications. This will be an agile process, starting with the highest priority for the Permanent Residency file. All deliverables in this section are based on the scope of the first Minimal Viable Product (MVP) which is the web-based release for Permanent Residency Intake.

This stream consists of the following 5 interdependent work packages as described below:

- DST1. Digital Intake Solution for Permanent Residency**
- DST2. Digital Architecture/Platform and Business Capability Model**
- DST3. Permanent Residency Release Roadmap**
- DST4. Agile Methodology and Governance**
- DST5. Proof Of Concept (POC) Chatbot**

DST1. Digital Intake Solution for Permanent Residency (responsive web service)

The Contractor must develop digital intake solutions that will provide the ability to accept IRCC clients for Permanent Resident applications. The Contractor will develop a series of Minimal Viable Products (MVPS) based on an Agile Methodology. Upon acceptance of an MVP, the Contractor will follow IRCC's Release Management process and work with IRCC to deploy the digital solution into production. The Contractor must provide the methodology, the approach and the plan to manage and perform all activities required.

Key Activities:

- Work an integrated team leveraging Agile Methodology and Delivery Approach with 2-week Sprints
- Creation of Project Plan and Backlogs
- Human Centered Design
- Creation of Production-Ready Digital Intake Solution as MVPs
- Integration with Cloud based Digital Platforms

Deliverables:

- Web Based Release for Permanent Residency Intake

DST2. Digital Architecture/Platform and Business Capability Model

Key Activities:

- Work with IRCC to deliver Technology Debt Reduction (TDR) outcomes
- Review IRCC Digital Platform Roadmap to reflect the impact of COVID-19
- Assess current TBS Digital Government policies in relation to IRCC services mandate
- Conduct Technology Options Analysis – Digital, Cloud, Disruptive and Emerging Technologies
- Work with IRCC, TBS and Shared Services Canada (SSC) on Enterprise Architecture Outcomes

Deliverables:

- Digital Architecture Strategy for Immigration Services
- Business Capability Modelling for Operations, IT/IM and Digital Services

DST3. Permanent Residency Release Roadmap

Key Activities:

- Review IRCC standard practices and release management
- Conduct interviews with senior leadership to evaluate potential release management approach
- Develop detailed multi-speed release management framework
- Conduct validation session, senior leadership across Digital, Operations and Programs, to refine the release management framework
- Build Release Roadmap for the Permanent Residency Digital Intake Solution and work plan defined as part of DST1.

Deliverables:

- Digital Solutions release framework and approach
- 12-month Permanent Residency Application release roadmap, beyond the MVP

DST4. Agile Methodology and Governance

Key Activities:

- Work with IRCC to build and prioritize backlog
- Discovery to perform user research, define features, build a high-level story map
- Scoping and analysis to define MVP of features, refine story map, design digital architecture, and confirm release and sprint plan.
- Delivery, including integration of test environments, design and build of functionality, testing functionality, conducting user testing and validation, and providing DevOps support.
- Release to production, conduct stakeholder review, facilitate feedback session, communicate to stakeholders

Deliverables:

- Delivering Agile Methodology & Governance approach to accelerate the Digital Service Transformation that IRCC needs due to COVID-19

DST5. POC Chatbot

Key Activities:

- Work with IRCC to confirm the scope of the chatbot by identifying the top questions (i.e., intents and answers) that the chatbot should be able to answer
- Review the current platform and confirm technology viability and feasibility
- Work with IT and Communications to prepare for public launch of minimum viable chatbot
- Deploy into production, monitor and support

Deliverables:

- Develop minimum viable (text only) chatbot

Digital Services Response Workstreams

DST6. Digital Services Support Model

The Digital Services Support Model task's objective is for the Contractor to provide IRCC with the required support and technical expertise to deploy the Permanent Residency Digital solution into production and address critical incidents. A technical support model will be implemented to manage incidents and support activities for the PR platform (including PR Confirmation and PR Intake) functionality, deployed into production and available to the public between November 2020 and March 2021.

Service Level Agreement: Support will be available Monday-Friday between 8 and 4 pm with a 4-hour response time for P1 critical incidents within support hours.

The support model responsibilities are described in Appendix A.

DST7. Digital Services Response : PR Confirmation

The Digital Services Response objective is to support IRCC in reducing the ongoing backlog pressures on Immigration Services. The Contractor and IRCC will continue to work as an integrated team to create simple and easy digital solutions for the PR confirmation stages of the PR application process. This will be conducted in an agile process, starting with the highest priority for the Permanent Resident file.

This tasking consists of deliverables to support the continued development of the Digital Permanent Residency Solution. The integrated Contractor / IRCC team will develop 2 mini-releases for the PR Confirmation Portal to achieve the following business benefits:

- **Enhance security** of the portal including Multi-Factor Authentication (MFA) for case workers and the increase of IRCC security certificates.
- **Improve business process for case workers** through the implementation of additional features, for example, case-editing, additional statuses for cases, pagination, etc.
- **Improve client experience** through the implementation of functionality enhancements and features to better accommodate different user groups, for example, better explanation of next steps, improved accessibility compliance, etc.

The contractor will continue to leverage the Agile delivery methodology and approach, as established on TA7113302 to deliver this work. The current requirements identified as priorities by IRCC include:

Client	Case Worker	System (IT Priorities)
1. Indicate if not in Canada and see clear next steps	6. Create profiles for multiple clients (for head of family or reps to use)	14. Automatically delete case history
2. Notify client via email or text of updates to their case file (a prompt to check their profile)	7. Edit case details	15. Integration with PR intake initiative (info will be useful for PR confirmation and PR card)
3. Self-declare that photo is of client/confirming identity	8. Edit step status	16. Auto sign out due to inactivity
4. Confirmation of case submission modal	9. Re-open profiles even after photo submitted for PR card production	17. Multi-Factor Authentication (case worker)
5. Indicate how photo taken (professional digital photo, scanned photo or selfie)	10. Preview eCoPR	18. Notify client via email of updates to their case file
	11. View self-declaration that photo is of client	
	12. View self-declaration that client is in Canada	
	13. View detail on how photo taken	

As part of early planning activities, the Contractor's preliminary assessment establishes that:

- 11 of the 18 items are planned for Sprint 7 (beginning immediately)

- 6 of the 18 items are potential for Sprint 8 / 9
- 1 of the 18 items requires more analysis and decomposition with the business to accurately size and prioritize (e.g. Profile for Multiple) and is a potential for Sprint 8 / 9 / 10
- The allocation and prioritization for Sprint 8-10 will be confirmed with the business as part of sprint planning
- Sprint 8-10 are planned for reduced development capacity as emphasis shifts to Intake

Upon acceptance of another MVP, the Contractor will follow IRCC's Release Management process and work with IRCC to deploy the digital solution into production. The Contractor must provide the methodology, the approach and the plan to manage and perform all activities required.

DST8. Digital Services Response : PR Intake

This Digital Services Response tasking consists of deliverables that will build upon the success of the PR Confirmation Portal and provide IRCC with further business benefits through digitizing the Permanent Resident Intake process. The development of a Minimal Viable Product (MVP1) for Digital Intake will include the "e-App" type functionality for the highest priority forms (identified below) that cut across all PR lines of business as foundational digitized information capture. There will still be PDF functionality available if clients are required to upload supporting documentation. In addition, the Integrated Contractor/IRCC team will identify one (agreed upon) full line of business to be digitized as a dynamic "e-App" for the end-to-end process (potentially with no PDF forms).

The Contractor will leverage the Agile Delivery Methodology to conduct discovery, build the backlog of requirements/user stories and define the business benefits to be achieved through the development of MVP1. The Contractor will follow IRCC's Release Management process and work with IRCC to deploy the digital solution into production.

The Integrated Contractor / IRCC team will digitize the PR intake process to achieve the following business outcome: Provide a digital intake service for PR clients to submit the application without the need to use paper, snail mail or in-person services. This will be done through the delivery of two key milestones: 1 silent pre-production release and 1 official release (MVP1).

The PR Intake Solution will aim to deliver following business benefits based on the findings and sizing of stories during the Discovery phase:

1. Log in to portal – hosted in a protected B environment – using username / password
2. Provide foundational information through a digitized form (including data from IMM-0008, IMM-008DE, IMM1344, Schedule A – Background/Declaration [IMM 5669], and IMM5406 – Additional Family Information)
3. Upload completed forms and supporting documentation: for submission and get notified that the application has been submitted successfully
4. View the status of the application (i.e. received, assigned to officer, returned, rejected, etc.), both from a case worker and a client perspective
5. Receive notifications from IRCC to inform clients on the status of their application and potential actions required

The following PR Intake requirements have been identified as part of a preliminary assessment of the functionality to be delivered by the end of February 2021. Specific requirements, prioritization, and implementation approach will be confirmed as part of Discovery.

Degree of Confidence (H,M,L)	Generic Intake Requirements (all lines of business):
<ul style="list-style-type: none"> High High 	<ol style="list-style-type: none"> Secure login for client (username/password and ability to retrieve password) to be able to complete activities over multiple sessions Leverage Protected 8 portal work done by PR Confirmation team to accelerate process and adhere to consistent architecture and security requirements of the Government of Canada Ability to assess the family members as a unit (all information can be linked to the Principal Applicant) Ability to input data blocks through e-forms to auto populate: <ol style="list-style-type: none"> IMM-0008 IMM-008DEP IMM1344 Schedule A - Background/Declaration [IMM 5669] IMM5406 – Additional Family Information IMM5476 – Use of a Representative
<ul style="list-style-type: none"> High High High High High High 	<ol style="list-style-type: none"> Ability to link to the checklist/pdf forms for the identified PR line of business – clients to download PDF forms, complete, sign forms Ability for clients to upload completed forms and supporting documentation Ability for clients to receive notification that their application was submitted successfully Ability to directly request missing documents or information from the clients without the need to fully return the application Ability for IRCC to send new documents (i.e. approval letter, landing ceremony invitation, etc.) Ability to view status of applications (i.e. received, assigned to officer, returned, rejected, etc.) – from both a case worker and client perspective Ability to sort applications by various data points (name, UCI know/existing, etc. – as with PR portal) Ability to triage applications received by line of business chosen/submitted by the client for processing by IRCC Work with IRCC to enable the transfer of documents from the portal to IRCC's environment (i.e. cloud, GCDOCs, etc.) Ability for the portal to link with the PR confirmation portal Ability for the portal to meet Treasury Board Secretariat accessibility requirements Ability to return incomplete applications with reason for return
<ul style="list-style-type: none"> High – Data points TBC at Discovery High High High High High Future MVP 	<ol style="list-style-type: none"> Input common data blocks through e-forms to auto-populate specific fields in PDFs forms
<ul style="list-style-type: none"> High: Line of Business TBC at Discovery 	<ol style="list-style-type: none"> End-to-end process for 1 PR Line of Business (To be confirmed) – without reverting to pdf forms

REVISED As of Amendment 6, in addition to the MVP1 release for Client Portal on March 30th, 2021, the contractor will deliver an MVP2 for supporting Case Worker portal by June 4th, and an MVP3 to digitize additional PDF forms by June 4th – IMM 5669, IMM 5406, IMM 5662, and IMM 0008 DEP for 5+ dependents.

Risk Advisory Services

The Contractor must provide advisory services focused on assessing IRCC's existing remote workforce posture, considering the challenges created as a result of COVID-19 and its impact on IRCC's ability to execute its mandate. The output from the initial assessment of the remote workforce posture will inform a refresh of IRCC's cyber security strategy, initially created in 2019. Throughout this work, an emphasis will be placed on reinforcing, improving, and advancing IRCC's digital services and supporting any digital initiatives, in light of the increased cyber security activities in light of COVID-19.

This remote workforce assessment and the cyber security strategy refresh will be influenced by IRCC's working relationship with Canadian Centre for Cyber Security (CCCS) and SSC. Once areas of improvement related to monitoring and/or network infrastructure have been identified, IRCC will need to work with CCCS or SSC to refresh the existing provided scope of services.

RAS1. Remote Workforce and Cyber Security Strategy Refresh

Key Activities:

- Conduct interviews with stakeholders and review documentation related to IRCC's remote workforce posture and existing digital transformation initiatives
- Provide an overview of environmental risks and threats in light of COVID-19
- Development of short- and medium-term recommendations, based on the focus on digital transformation initiatives and immediate remote workforce needs
- Draft updated cyber security strategy roadmap and work packages, highlighting key responsibilities by organization and changes that will directly impact digital transformation initiatives

Deliverables:

- Project plan, outlining the proposed approach for the remote workforce and cyber security strategy refresh

- Summary of the existing remote workforce posture, with the move to a more remote workforce
- Updated cyber security strategy roadmap and work packages, supported by overall recommendations / focus areas tied to digital initiatives and immediate remote workforce needs

REVISED

Technology Advisory Services

IRCC is currently on Oracle Siebel version IP2016 and in order to support digital services needs to investigate the implications and effort to migrate both of their Siebel applications, Grants and Contributions (GCS), and the Global Case Management System (GCMS), to Siebel 2021.xx*. This TA describes the key activities and end result (Deliverables) that will be conducted to complete a diagnostic assessment of work done to date to prepare for the upgrade and assess next steps. It is expected that the work to complete the Diagnostic Report will be conducted over a period of 3 weeks.

Key Activities:

- Upgrade:
 - Assess the documentation of the previous work towards a Siebel upgrade
 - Identify gaps between previously conducted assessment of then-current Siebel version and the new target version
 - Review IRCC's draft Siebel upgrade roadmap for both applications and identify potential gaps, risks, and dependencies
 - 2-3 discussions with the Siebel technical teams and 2-3 discussions with functional/business teams to answer questions about the provided documentation will be required
- Cloud
 - i. Review IRCC's previous documentation, approach and other materials prepared around a migration of each Siebel application to cloud
 - ii. Conduct a gap analysis of the current work performed against a comprehensive cloud migration roadmap and make recommendations of next steps

Assumptions:

- IRCC will provide requested documentation prior to the start date

Deliverables:

- Diagnostic Report which would include:
 - Identified gaps, risks, and/or dependencies in IRCC's draft Siebel upgrade roadmap
 - Identified gaps, risks, and/or dependencies in IRCC's draft Siebel cloud migration roadmap
 - Recommendations for next steps to prepare for the Siebel upgrade of both applications and cloud projects

Following the completion of the Diagnostic Report, we propose an alignment on the following future deliverables to support IRCC in finalizing the plans for the Siebel upgrade. The Technology Advisory Services Planning Deliverables, would include the following:

- Upgrade Assessment Refresh
- Updated Siebel upgrade roadmap
- Updated cloud migration roadmap
- Upgrade project charter

Change Management

The contractor will support the Transformation Change Management Office (TCMO) to develop a program level change management approach, function model (interaction model across the Transformation Programme, levers and CM hub), and a toolkit to deliver change.

CM1. Transformational Change Management Office Strategy & Implementation Plan

Outcomes:

- Consistent and adaptable approach to serve change management needs across the transformation programme
- Measurable and consistent approach to monitoring change (KPIs for readiness, adoption and change activities effectiveness)
-

Key Activities:

- Case for Change Canvas Session
- Develop components of change strategy
- Review existing OCM documentation for an understanding of current CM practices

Deliverables:

Change Management Strategy

- a. Proposed high-level approaches for the following:
 - i. Change Impact Assessing and Reporting
 - ii. Communications and Stakeholder Engagement
 - iii. Change Readiness Assessments and Reporting
 - iv. Learning & Capability Needs Assessment
- TCMO Implementation Plan (launch plan)

CM2. Transformational Change Management Office Function Model

Outcomes:

- Objectives, goals and consistent messaging for the TCMO function
- Define partnership with CM hub
- Define working model with Transformation Programme – including levers

Key Activities:

- Interviews with key leaders to inform goals, mandate and objective of TCMO
- Workshop with levers to understand needs to inform service offering and interaction model
Workshop with Transformation Programme to understand requirements and share initial thinking and proposed models
- Workshop with working group to review and discuss different interaction and service model options
- Design high-level TCMO roles and responsibilities supporting the interaction model

Deliverable:

- TCMO Function Design PowerPoint Document including:
 - i. TCMO objectives, mandate and goals
 - ii. High Level structure including roles and responsibilities

iii. TCMO interaction model with other levers

iv. TCMO service offering delivery model (including Transformation Programme and partnership with CM Hub)

CM3. Transformational Change Management Office Toolkit

Outcomes:

- Future view of TCMO toolkit to deliver change management activities across the levers.

Key Activities:

- Assessment activity to review existing tools
- Share standard tools and templates to help drive standardization and adoption
- Workshop to present industry practices and approach of tools / templates shared

Deliverable:

- 3-4 CM tool templates
- Workshop output

As of Amendment 4, in addition, the contractor will support TCMO to implement their new service delivery model to serve the CM needs across the Digital Transformation Programme. The support will be focused in two work areas, co-delivery on the immediate CM needs on the Programme Roadmap, and for Deloitte to develop and deliver a CM Roadmap across the Programme initiatives.

CM4. Co-Delivery of CM Support to TCMO Clients

Outcomes:

- Capacity and capability to deliver / execute on CM needs for the programme
- Knowledge Transfer and Change delivery Capability building to TCMO team members

Key Activities:

- Leveraging the TCMO Service Delivery Model and Change Management Approach, to support TCMO in hitting the ground running early January in order to co-deliver on Change Management for Digital Journey Lab #3
- Support TCMO delivery of Key activities as part of the 'Define Success' phase within the Change Management approach for projects other than DJL Lab#3. Key activities as part of the 'Define Success' phase include:
 - Change Initiation Form and Lever Leadership Interview
 - Initial Change Canvas Session
 - Persona Assessment
 - Leadership Alignment interviews
 - Change Metrics Assessment
- Enterprise Change Management Branch Canvas Session
 - Conduct a Canvas session to support the ECMB to align on model and coalition vision

Deliverable:

- DJL Lab #3 Change Roadmap and execution during engagement duration.

CM5. Transformation Programme CM Roadmap

Outcomes:

- CM Initiation and CM Roadmap for the Transformation Programme Office
- Impacted stakeholders identified across the programme
- Preliminary view of changes / impacts across the Programme
- Integrated view of CM activities across the Transformation Programme

Key Activities:

- a. Development of CM Roadmap for each lever with a preliminary view of change activities across the lever initiatives (against Jan 2021 Digital Transformation Programme Roadmap).
- b. Partnering with Transformation Programme Office to develop metrics and capability building required to deliver on the digital strategy
- c. Development of CM Roadmap for the Transformation Programme Office

Deliverable:

- Transformation Programme CM Roadmap

Innovation and Experimentation

Key Activities

Conduct kick-off to align on objectives, stakeholder engagement and gather documentation related to current RPA capabilities and PoCs.

- **Develop RPA Vision and Guiding Principles:**
 - Conduct an RPA Workshop for the IRCC team to define the vision and guiding principles and discuss options for operations (e.g. enterprise vs corporate services approach). Include, at the IRCC's direction, stakeholders from other Branches across IRCC affected by the automation strategy
 - Based on workshop input, develop an artifact that outlines IRCC's vision for RPA and guiding principles
 - Define and validate RPA Program objectives
- **Define Sustainment and Operating Model:**
 - Define operating model type and structure (Centralized vs. Decentralized vs. Hybrid)
 - Define and document at a high-level the roles, responsibilities, skills and capabilities required to manage and operate each function within the operating model:
 - Guidance on required strategic Advisory Functions
 - **Leadership Integration:** set the strategy and vision for Automation and act as the integration point between groups
 - **Automation Management:** plan and drive progress; ensure alignment to the vision; and report to leadership
 - Guidance on required automation Delivery Functions
 - **Release and Integration Planning & Coordination:** Guidance on how to plan individual releases and engage stakeholders at the management level with consideration to existing release management processes at IRCC
 - **Change Management & Communications:** minimize workforce impacts and ensure workforce transition
 - **Automation Performance and Benefits Tracking:** define key performance measures, and track / report on benefit realization
 - **Process Intake:** select processes for automation that possess strong business value, and maintain pipeline for future releases

- **Process Optimization:** execute process changes to optimize a process to enable automation or extend the scope of automation
- **Automation Releases:** deliver the automated solution to production (which involves the design / build / testing & Review / deployment)
- **Automation Support & Maintenance:** conduct incident management, managing robot capacity, and scheduling including IRCC integration points.
- **Automation Operations:** support with day-to-day operations, including workload management and exception handling

- Develop Resource Plan:
 - Based on the operating model, identify staffing options for these roles (i.e., how will these roles be staffed - internal vs. contractor) for Year 1 of the RPA Program
- Develop RPA process for TR-PR PoC with production ready code
 - Configure and unit test solution according to requirements defined by IRCC
 - Conduct QA testing and validate solution functionality is Production ready

2. PERIOD OF SERVICES	FROM (DATE): August 18, 2020 TO (DATE): June 18, 2021
3. Work Location:	N/A – All work to be conducted remotely.
4. Invoice sent to:	FINInvoices-FacturesFIN.IRCC@cic.gc.ca [send copy of invoice to: carole.holden@tpsgc-pwgsc.gc.ca]
5. Travel Requirements:	N/A – All work to be conducted remotely.
6. Language Requirements:	English.
7. Other Conditions / Constraints:	N/A.
8. Level of Security Clearance Required for the Contractor Personnel:	Reliability Status.

9. Contractor's Response:

Please see beginning of response details on next page.

9.1 Milestone/Deliverable and Payment Schedule

Milestone/Deliverable	Delivery Week	Firm Price Amount
DST – Sprint 1 – Discovery & Backlog Development (DST1-DST4)	11-Sep-20	
RAS D1. Detailed Project Plan for Remote Workforce Security Review and Cyber Security Strategy and Roadmap Refresh	20-Nov-20	
RAS D2.1 Preliminary Summary of Remote Workforce Security Posture	11-Dec-20	
TAS D1. Project Plan including milestones and timelines of the assessment project	11-Dec-20*	

TAS D2.1 System Upgrade Assessment Report (Initial Findings)	11-Dec-20*	
IE D1. Call Centre Process Design Document (PDD)	11-Dec-20*	
DST – Sprint 2 and 3 – Development (DST1-DST4)	9-Oct-20	
CM D1. Change Strategy	18-Dec-20	
IE D2 / DST D5. Call Centre RPA POC	18-Dec-20*	
IE D3. Process Automation assessment for IRCC Call Centre	18-Dec-20*	
RAS D2.2 Final Summary of Remote Workforce Security Posture	18-Dec-20	
RAS D3. Updated Cyber Security Strategy and Roadmap	12-Feb-21	
TAS D2.2 System Upgrade Assessment Report (Final Report)	18-Dec-20*	
DST – Sprint 4 and 5 – Development (DST1-DST4)	6-Nov-20	
CM D2. Interaction Model	11-Dec-20	
CM D3. Change Toolkit	20-Nov-20	
CM – DJL Lab #3 Change Roadmap	5-Mar-21	
CM – Transformation Programme CM Roadmap	31-Mar-21	
DST – Sprint 6 and 7 – Development & Hypercare, User Research / Testing & Next Steps (DST1-DST4)	7-Dec-20	
DST – December – PR Intake Discovery, PR Confirmation Sprint 7 and mini-release, PR Support (0 P1 Critical Incidents Open) (DST6-DST8)	31-Dec-2020	
DST – January – PR Intake Sprint 1-2 and silent release, PR Confirmation Sprint 8-9, PR Support (0 P1 Critical Incidents Open) (DST6-DST8)	31-Jan-2021	
DST – April – Sprint 3-6 – PR Intake MVP2 development and testing, Release readiness, PR Support (0 P1 Critical Incidents Open) (DST6 – DST8)	04-Jun-2021	
DST – April – Sprint 7-8 - PR Intake MVP2 release and hypercare, PR Support (0 P1 Critical Incidents Open) (DST6-DST8)	04-Jun-2021	
Oracle Siebel Diagnostic Report	22-Jan-2021	

s.19(1)

s.20(1)(b)

Technology Advisory Services Planning Deliverables	12-Mar-2021*	
NEW RPA Vision and Guiding Principles	04-16-2021	
NEW RPA Sustainment and Operating Model	05-07-2021	
NEW RPA Resourcing Plan	05-14-2021	
NEW RPA Developer support	04-30-2021	
NEW DST: DST – May release – Sprint 8-10 PR Intake MVP3 development, release and hypercare, PR Support (0 P1 Critical Incidents Open) (DST6-DST8)	04-Jun-2021	
Total		\$5,048,500 \$5,224,260 \$5,414,260

* dates indicate tentatively planned dates requiring IRCC resource availability confirmation

Deliverable and Milestone Inspection and Acceptance: The Project Lead, on behalf of the Technical Authority, will inspect and accept the deliverables (as outlined in section 1) and milestones within 3 business days of submission from the Contractor, prior to payment processing.

9.2 Total Cost

Cost breakdown:

Deloitte understands that only Name, PWGSC Security File Number, and Date of Birth is required to be provided for future additional resources.

Please refer to Deloitte_TA7113302_B9220-210014-001_Resource_Update_2020-10-07.xlsx for details of resources added to this Task Authorization.

Category and Name of Proposed Resource	PWGSC Security File Number	Firm Per Diem Rate	Estimated # of Days	Total cost
A.6 Programmer / Software Developer - Level 2				
- P.5 Project Executive -				
Level 3				
- P.5 Project Executive -				
Level 3				
- P.5 Project Executive -				
Level 3				
- P.5 Project Executive -				
Level 3				
- P.5 Project Executive -				
Level 3				
- B.3 Business Consultant -				
Level 2				

	- P.5 Project Executive -
Level 3	
	- B.3 Business
Consultant - Level 2	
	- B.3 Business
Consultant - Level 2	
	- P.5 Project Executive -
Level 3	
	- P.5 Project Executive - Level
3	
	- B.3 Business
Consultant - Level 2	
	- B.3 Business Consultant -
Level 2	
	- B.3 Business Consultant -
Level 2	
	- P.5 Project Executive -
Level 3	
	- P.5 Project
Executive - Level 3	
	- A.6
Programmer / Software Developer - Level	
2	
	- B.3 Business Consultant -
Level 3	
	- I.11 Technology
Architect - Level 3	
	- P.5 Project Executive - Level
3	
	P.8 Project Leader - Level 3
	- P.5 Project Executive -
Level 3	
	- B.3 Business
Consultant - Level 3	
	- A.1 Application
Software Architect - Level 3	
	- P.2 Enterprise Architect -
Level 3	
B.3 Business Consultant - Level 3	
<i>(This position will be filled at a later date via a TA amendment)</i>	
	- B.3 Business Consultant -
Level 2	
	- B.3 Business Consultant -
Level 2	
	- B.3 Business
Consultant - Level 2	
	- B.3 Business Consultant
- Level 2	
	- A.6 Programmer / Software
Developer - Level 1	
	- A.6 Programmer /
Software Developer - Level 1	
	- B.3 Business
Consultant - Level 1	
B.3 Business Consultant - Level 1	
<i>(This position will be filled at a later date via a TA amendment)</i>	
B.3 Business Consultant - Level 1	
<i>(This position will be filled at a later date via a TA amendment)</i>	
B.3 Business Consultant - Level 1	
<i>(This position will be filled at a later date via a TA amendment)</i>	
	- B.3 Business Consultant
- Level 1	

- B.3 Business Consultant - Level 1	
- B.3 Business Consultant - Level 1	
- B.3 Business Consultant - Level 1	
- B.3 Business Consultant - Level 2	
B.3 Business Consultant - Level 1	
B.3 Business Consultant - Level 1 (This position will be filled at a later date via a TA amendment)	
B.3 Business Consultant - Level 2 (This position will be filled at a later date via a TA amendment)	
B.3 Business Consultant - Level 2 (This position will be filled at a later date via a TA amendment)	
- B.3 Business Consultant - Level 1	
B.3 Business Consultant - Level 2 (This position will be filled at a later date via a TA amendment)	
B.3 Business Consultant - Level 1 (This position will be filled at a later date via a TA amendment)	
B.3 Business Consultant - Level 1 (This position will be filled at a later date via a TA amendment)	
B.3 Business Consultant - Level 1 (This position will be filled at a later date via a TA amendment)	
B.3 Business Consultant - Level 2 (This position will be filled at a later date via a TA amendment)	
B.3 Business Consultant - Level 1 (This position will be filled at a later date via a TA amendment)	
B.3 Business Consultant - Level 1 (This position will be filled at a later date via a TA amendment)	
Sub-Total	\$5,508,200.00 \$5,745,090.00
Adjustment to reflect fixed price milestones / deliverables for this TA (July 2020)	\$ (94,930.00)
Adjustment to reflect fixed price milestones / deliverables for this TA (November 2020))	\$(189,010)
Adjustment to reflect fixed price milestones / deliverables for this TA (May 2021 – Amendment 6)	\$(1,890)
	\$5,048,500.00 \$5,224,260.00 \$5,459,260.00
Sub-Total of TA (Taxes Extra) (A):	\$756,012.88 \$782,332.94 \$817,524.19
Applicable Taxes (B):	\$5,804,512.88 \$6,006,592.94 \$6,276,784.19
Total Cost of TA (Taxes included) (C= A + B):	

9.3 Key Contractor Assumptions and Dependencies

- Assumptions

- This work will be delivered at a firm fixed price as per the milestone / deliverable payment schedule above. The total fixed price is reflective of ~~\$5,459,260.00~~ ~~\$5,224,260.00~~ ~~\$5,048,500.00~~ sub-total of the TA and ~~\$817,524.19~~ ~~\$782,332.94~~ ~~\$756,012.86~~ in applicable taxes (based on a tax rate of 14.975%). This results in a total fixed price of ~~\$6,276,784.19~~ ~~\$6,006,592.94~~ ~~\$5,804,512.86~~.
- The cost breakdown provided is reflective of estimated effort and assumptions at the time of TA submission. Actual hours may vary from these estimates over the course of delivery, but will not impact the price to deliver the scope described in this fixed price TA
- The start date for this work will be the week of August 18, 2020
- The end date for this TA will be **June 18, 2021** to allow additional time for deliverable acceptance
- **Completion Date** The work will be completed between August 18, 2020 and **June 4, 2021** and required IRCC stakeholders will be available to support this phase of work
- Activities and deliverables will be completed in collaboration with IRCC
- IRCC will identify the stakeholders to attend any information sessions and meetings
- Work will be conducted remotely via telephone and videoconferencing as appropriate
- For each of the workstreams, Deloitte and IRCC will confirm the deliverable sign-off process as part of the first week of work on this TA. This will include identifying who from IRCC will provide approval for each workstream / deliverable.
- Deliverables and work products (i.e., presentation material, tools and templates) will be provided in English. Translation, if required, will be provided, in a timely manner, by IRCC.
- Completion of the work within this TA will not preclude Deloitte from providing support to additional IRCC initiatives and priorities.
- Deloitte will not have access to live production data
- **NEW:** Deloitte offices will be closed between December 24 and January 4. Limited support will be available for P1 Critical support incidents via a process to be confirmed with IRCC

Workstream 1 – Digital Transformation Services – Assumptions

- As part of Sprint 1 and Sprint 2 – Deloitte will work with IRCC to confirm the release schedule and approach. For each of sprints 3-6, Deloitte will produce production-ready MVP and functionality, and will work with IRCC to confirm when the functionality will be deployed to production
- Deloitte and IRCC will work together on Sprint Planning for Release 1. This includes the scope of each MVP after each sprint and the viability of a production-ready MVP to achieve a business objective
- IRCC will be responsible for facilitating any SA&A process steps and / or security authorities to operate
- IRCC will be responsible for defining and executing the deployment process for the production-ready code as per their standard procedures, governance, etc.
- IRCC will be responsible for identifying impacts of the MVP to current processes and providing training, communications, change management, job aids, etc. to users to facilitate the deployment and drive adoption of the service
- IRCC will be responsible for gathering any current state performance metrics related to current processing in order to facilitate any benefits tracking and reporting that may be required for the digital service
- The Deloitte support service hours are 8 am ET to 4pm ET, Monday to Friday with a 4-hr response time for P1 Critical incidents within support hours. Responses between December 24 – January 1 may be delayed. Deloitte will work with IRCC to confirm and align on support coverage requirements and expectations during this period
- **NEW:** The solutions developed as part of the Digital Transformation Services stream will be stand-alone and will not be integrated to existing IRCC systems (e.g. GCMS).
- **NEW:** As part of PR Intake MVP2 for Case Worker portal, functionality will include validation and generation of 2D barcodes from IMM 0008 to facilitate the uploading of information into GCMS. IRCC will be responsible for providing access to appropriate GCMS environments for development and testing. Alternatively,

IRCC will provide access to IT and business users who can support the testing of 2D barcode generation and uploading into GCMS.

- **Design Pod:**

- As it relates to the design / user-research stream:
 - Deloitte will...
 - Be the process owner as it relates to all user research and validation
 - Be the content owner on all user research protocols and processes
 - Support stakeholder outreach, including development of engagement materials and/or communications (as it relates to any research with internal IRCC research participants)
 - Ensure consistent and meaningful knowledge sharing between Deloitte and IRCC
 - IRCC will...
 - Following standard practice in research, participants will be provided with a one-time compensation for their time in the form of cash or cash equivalent (details to be agreed upon between Deloitte and IRCC).
 - Commit to devoting time and resources to supporting the project
 - Provide ready access to colleagues, expertise, and information connected to the user research
 - Own stakeholder interview logistics, planning and coordination as they relate to any internal stakeholders
 - Attend proposed meetings and provide feedback in a timely manner as it relates to research processes and protocols

▪ **Build & Technical Pod:**

- NEW: Deloitte will:
 - Own the sizing of user stories based on technical expertise and complexity associated to the desired functionality
 - Own the development and co-review testing of each story
 - Develop and manage a quality assurance strategy to enable IRCC to test system integration, security, legal, accessibility and overall functionality of the solution from the end-user viewpoint
 - Support IRCC to sign-off on Quality Assurance decisions and prioritization of bugs to be fixed within the agreed upon timeline
 - Ensure consistent and meaningful knowledge sharing between Deloitte and IRCC
 - Support IRCC in standing up the support model and manage the support activities for the solutions deployed to production
- IRCC will:
 - Provide a dedicated PO who has the ability to make decisions and will help liaise with those at IRCC required for meetings, sign-offs, etc.
 - PO to prioritize stories which should consider technical requirements
 - Provide confirmation on the technical architecture and infrastructure
 - Provide technical capabilities / resources to answer questions related to tech stack, platform, environments, etc. – this person does not need to be dedicated but does need to be able to provide significant time and will need to have an understanding of existing databases, integrations, existing APIs, etc. (although the web app is meant to be stand alone, there will be components that rely on existing data)

- Provide the right decision makers / owners to determine requirements and solidify the MVP scope; scope should take into account technical requirements
- Sign off on designs before they are developed – we cannot develop designs that do not have sign off; if changes are required post sign-off they will be added to the backlog and be prioritized by the PO
- Confirm technical assumptions
- Provide security requirements (e.g. audit logs given PII data, etc.) that should be part of the MVP; if security requirements are being omitted from the MVP, IRCC to provide sign-off on these decisions
- Set-up dev and staging environments ahead of start date
- Ensure development pipeline is set-up
- Identify resource who will be responsible for deploying code to Production (Deloitte tech lead / developers can be on the phone, etc. but cannot actually submit the code for production)
- Commit to devoting time and resources to discovery workshops and throughout the development sprints as additional clarification is required
- Develop the go-live support documentation which includes the authority to operate documentation, Go/no-go decision criteria, release strategy and departmental approvals
- Perform security testing, performance testing, agent training / communications / change management, public / media communications, etc. In support of go/no-go decision criteria (consistent with approach to PR Confirmation MVP1)

Workstream 2 – Risk Advisory Services – Assumptions

- IRCC will provide consent and coordinate introductions for Deloitte to discuss with other supplier Government of Canada departments (incl. ESDC, SSC, TBS, etc.) in support of this assessment

- Workstream 3 – Technical Advisory Services – Assumptions

- Deloitte will have access to the IRCC Siebel test environment to facilitate the review
- During this period, we expect to run 10 - 15 virtual workshops/sessions, ranging from 1 – 3 hrs, with stakeholders identified below to gather information, obtain clarifications and share findings
- Deloitte will produce an executive briefing deck (PPTX) based on the findings of the assessment
- Activities and deliverables will be completed in collaboration with IRCC.
 - Access to Siebel documentation for the current IRCC implementation
 - Access to the testing environment
 - Understanding of the Production environment Architecture Diagram and review of set-up will be required on week 1
 - Understanding of the current servers' licensing model will be required on week 1
 - Outcomes from this activity will provide an assessment of the current architecture and application configuration of the IRCC Siebel Implementation
 - A roadmap for future activities will be created outlining the timelines for the upgrade from IP2016 to Siebel 2019
- IRCC will identify the stakeholders to attend any information sessions and meetings.
 - At a minimum, the following resources will be available to attend sessions, meetings and address questions as they arise: IRCC technical team Technical architect, Siebel administrators, Siebel developer, Integration team, Database administrator, Tester, Release manager others to be identified as needed
- When working in agile, not all information is available early, the DJL Lab#3 Change Plan will be as detailed as per information available at the time of the engagement

Workstream 4 – Change Management Services – Assumptions

- IRCC will identify their internal requirements for OCM resourcing
- Subject Matter Experts will be available to attend meetings, working sessions and other activities per project plan
- Project Leadership will be available to aid in identifying key stakeholders
- IRCC will provide background documentation to Deloitte to assist with determining the current state
- Documentation and materials will be developed in English and all required translation of materials will be arranged by IRCC
- Conduct 5-7 stakeholder interviews for data gathering and alignment
- Facilitate 1-2 Change Canvas working sessions with IRCC stakeholders

Workstream 5 – Innovation and Experimentation – Assumptions

- Our fixed fee is based on the estimated effort and informed by our understanding of IRCC's needs and the underlying assumptions in our proposed approach
- IRCC staff assigned to the Project will be able to represent IRCC's business and technical requirements and will be empowered to make decisions related to the scope of their role on the Project
- Developers will be granted access to all relevant environments to complete configuration by IRCC; delays to access may necessitate a revision of scope via a change request

Dependencies

- Some team member names (as identified in the table above) are dependent on confirming the solution stack and timing of activities (during weeks 1 and 2). The cost table above is reflective of effort estimates and resource type.
- Digital Transformation Roadmap – the CM Roadmap will be based on initiatives identified on the current Transformation Roadmap
- Implementation of the TCMO Function model is dependent on its approval

10. Contractor's Signature	
Name, Title and Signature of Individual Authorized to Sign on Behalf of Contractor <div style="text-align: center; font-size: 1.2em;">Shannon Kot</div> <div style="text-align: center; font-size: 0.8em;">(type or print)</div>	Signature: _____ Date: <u>5/14/2021</u>
11. Approval – Signing Authority	
Signatures (Client)	

Name, Title and Signature of Technical Authority to Sign on Behalf of CIC (type or print)	Signature: <u>Subhani, Omar</u> <small>Digitally signed by Subhani, Omar Date: 2021.05.17 09:18:52 -04'00'</small> Date: _____
Name, Title and Signature of CIC Procurement Representative to Sign on Behalf of CIC (type or print)	Signature: <u>Strangemore, Jessica</u> <small>Digitally signed by Strangemore, Jessica Date: 2021.05.17 12:17:32 -04'00'</small> Date: _____
Signatures (PWGSC)	
Name, Title and Signature of *Contracting Authority to Sign on Behalf of Public Works and Government Services Canada (type or print)	Signature: <u>Carole Holden</u> <small>Digitally signed by: Holden, Carole Date: 2021.05.17 14:00:53 -04'00'</small> Date: _____
You are requested to sell to her Majesty the Queen in Right of Canada, in accordance with the terms and conditions set out herein, referred to herein, or attached hereto, the services listed herein and in any attached sheets at the price set out there of.	

AMENDMENT NO: 7

APPENDIX B TO ANNEX A TASK AUTHORIZATION FORM

TASK AUTHORIZATION (TA) FORM			
Contractor:	DELOITTE INC.	Contract Number:	B9220-210014/001/ZM
Commitment Number (PR#):	153079	Financial Coding:	0500-0140-6762-54080-9220-9998
Task Number:	7113302 TA 01	Amendment Number:	007
Issue Date:		Response required by:	
1. STATEMENT OF WORK (WORK ACTIVITIES, CERTIFICATIONS AND DELIVERABLES)			
<p>NEW Amendment #007 is raised to:</p> <ul style="list-style-type: none"> Amend the Deliverable/Milestones dates for Workstream 5 – Innovation & Experimentation Increase the value of the TA by \$40,000 (exclusive of tax) for extended timeline for Deliverable/Milestone Correct milestone total from previous amendment <p>NEW Amendment #006 is raised to:</p> <ul style="list-style-type: none"> Amend the Deliverable/Milestones for Workstream 1 - Digital Service Response Increase the value of the TA by \$235,000 (exclusive of tax) for new Deliverable/Milestone <p>NEW Amendment #005 is raised to:</p> <ul style="list-style-type: none"> Amend the Description of the Project/Work required for the Innovation & Experimentation Workstream Revise deliverables and respective schedule for the Innovation & Experimentation Workstream No change to TA value <p>NEW Amendment #004 is raised to:</p> <ul style="list-style-type: none"> Extend Deloitte services to deliver Change Management support against the TA01 for the Transformation Change Management Office (TCMO) Increase the value of the TA by \$175,760.00 (exclusive of tax) in new Deliverable/Milestones for Workstream 4 – Change Management <p>NEW Amendment #003 is raised to:</p> <ul style="list-style-type: none"> Amend the Description of the Project/Work required (highlighted in yellow) Revise deliverables and their respective schedule <p>Amendment #002 was raised to:</p> <ul style="list-style-type: none"> Amend the Description of the Project/Work required Extend the end date of the TA Increase the value of the TA by \$2,500,000.00 plus \$374,375.00 in applicable taxes for a total increase amount of \$2,874,375.00 Add a Milestone/Deliverable and revise existing Milestones and their respective schedule. <p>Amendment 002 focuses on the Digital Services Response work stream and includes several work packages to</p>			

achieve the overall objectives to satisfy Ministerial commitments for the PR file and continue to enable IRCC to respond to the ongoing pandemic pressures

Amendment #001 was raised to:

Revised Delivery Weeks for the following Work Streams

- Risk Advisory Services (RAS)
- Technology Advisory Services (TAS)
- Change Management (CM)
- Innovation and Experimentation (IE)

New and Revised content to Section 1. Statement of Work for the following areas:

- Change Management (CM)

Description of the Project / Work Required:

Digital Service Transformation- Emergency Response to COVID-19

Immigration, Refugees and Citizenship Canada (IRCC) is seeking the services of a global organization(s) (the "Contractor") with expertise in rapidly developing and implementing Digital solutions and supporting technologies in response to the recent global pandemic. COVID-19 has increased the urgency for IRCC to develop updated (i) new strategies, and (ii) processes and digital systems to cope with the rapid change it is undergoing. These include updating systems and processes for internal staff, re-thinking and re-designing how IRCC provides its services to its clients within Canada and around the world, leveraging digital processes wherever possible thus minimizing the need for in-person interaction or paper-based processes for the safety of IRCC's staff, clients and community.

The scope of this Task Authorization is to work with IRCC to support this Digital Services Response project through several complementary work streams. This includes the execution of critical activities in a timely and efficient manner by leveraging leading practices and advanced technologies.

This Task Authorization has five primary work streams to achieve the overall objectives for the CIO Organization:

- Digital Services Response
- Risk Advisory Services
- Technology Advisory Services
- Change Management
- Innovation and Experimentation

The focus of Amendment 02 is on the Digital Services Response work stream and includes the following work packages to achieve the overall objectives to satisfy Ministerial commitments for the PR file and continue to enable IRCC to respond to the ongoing pandemic pressures:

- Digital Services Support Model
- Digital Services Response: PR Confirmation
- Digital Services Response: PR Intake

Background

On March 11, 2020, the World Health Organization (WHO) declared the newly discovered Corona virus (COVID-19) as a global pandemic. With COVID-19, rapidly spreading and creating serious health threats across the globe, citizens, businesses, and governments are significantly disrupted creating an unprecedented economic impact.

The Government of Canada has taken unprecedented action in an effort to slow the spread of this virus. It has implemented significant international travel restrictions, significantly reduced in-person interactions with Government personnel, recalled citizens and staff from abroad and implemented strict guidelines for physical distancing and remote working. IRCC provides a critical array of services in support of temporary residents (temporary foreign workers, international students and visitors), permanent residents, citizenship seekers, refugees and asylum

claimants and directly to Canadian citizens for passports and other travel documentation. Many of the above programs are currently supported by in-person or paper-based processes. Those processes that do include some automation are supported by aging IT systems that are not readily able to be adapted to support this new way of working or at the pace of change required to respond to the rapidly evolving response to the COVID-19 emergency... Success requires establishing a rapid capacity for change through immediate actions. Digital services strategies are required to facilitate a simplified, digitally enabled experience to improve productivity, while providing for new digital channels that will empower clients and applicants to carry out quicker processes easily, securely and conveniently.

TASKS

Digital Services Transformation

The Digital Services response objective is to support IRCC in reducing the backlog and pressures on Immigration Services. The Contractor and IRCC will work as an integrated team to create simple and easy digital solutions across the application process for all types of visa applications. This will be an agile process, starting with the highest priority for the Permanent Residency file. All deliverables in this section are based on the scope of the first Minimal Viable Product (MVP) which is the web-based release for Permanent Residency Intake.

This stream consists of the following 5 interdependent work packages as described below:

- DST1. Digital Intake Solution for Permanent Residency**
- DST2. Digital Architecture/Platform and Business Capability Model**
- DST3. Permanent Residency Release Roadmap**
- DST4. Agile Methodology and Governance**
- DST5. Proof Of Concept (POC) Chatbot**

DST1. Digital Intake Solution for Permanent Residency (responsive web service)

The Contractor must develop digital intake solutions that will provide the ability to accept IRCC clients for Permanent Resident applications. The Contractor will develop a series of Minimal Viable Products (MVPS) based on an Agile Methodology. Upon acceptance of an MVP, the Contractor will follow IRCC's Release Management process and work with IRCC to deploy the digital solution into production. The Contractor must provide the methodology, the approach and the plan to manage and perform all activities required.

Key Activities:

- Work an integrated team leveraging Agile Methodology and Delivery Approach with 2-week Sprints
- Creation of Project Plan and Backlogs
- Human Centered Design
- Creation of Production-Ready Digital Intake Solution as MVPs
- Integration with Cloud based Digital Platforms

Deliverables:

- Web Based Release for Permanent Residency Intake

DST2. Digital Architecture/Platform and Business Capability Model

Key Activities:

- Work with IRCC to deliver Technology Debt Reduction (TDR) outcomes
- Review IRCC Digital Platform Roadmap to reflect the impact of COVID-19
- Assess current TBS Digital Government policies in relation to IRCC services mandate
- Conduct Technology Options Analysis – Digital, Cloud, Disruptive and Emerging Technologies

- Work with IRCC, TBS and Shared Services Canada (SSC) on Enterprise Architecture Outcomes

Deliverables:

- Digital Architecture Strategy for Immigration Services
- Business Capability Modelling for Operations, IT/IM and Digital Services

DST3. Permanent Residency Release Roadmap

Key Activities:

- Review IRCC standard practices and release management
- Conduct interviews with senior leadership to evaluate potential release management approach
- Develop detailed multi-speed release management framework
- Conduct validation session, senior leadership across Digital, Operations and Programs, to refine the release management framework
- Build Release Roadmap for the Permanent Residency Digital Intake Solution and work plan defined as part of DST1.

Deliverables:

- Digital Solutions release framework and approach
- 12-month Permanent Residency Application release roadmap, beyond the MVP

DST4. Agile Methodology and Governance

Key Activities:

- Work with IRCC to build and prioritize backlog
- Discovery to perform user research, define features, build a high-level story map
- Scoping and analysis to define MVP of features, refine story map, design digital architecture, and confirm release and sprint plan.
- Delivery, including integration of test environments, design and build of functionality, testing functionality, conducting user testing and validation, and providing DevOps support.
- Release to production, conduct stakeholder review, facilitate feedback session, communicate to stakeholders

Deliverables:

- Delivering Agile Methodology & Governance approach to accelerate the Digital Service Transformation that IRCC needs due to COVID-19

DST5. POC Chatbot

Key Activities:

- Work with IRCC to confirm the scope of the chatbot by identifying the top questions (i.e., intents and answers) that the chatbot should be able to answer
- Review the current platform and confirm technology viability and feasibility
- Work with IT and Communications to prepare for public launch of minimum viable chatbot

- Deploy into production, monitor and support

Deliverables:

- Develop minimum viable (text only) chatbot

Digital Services Response Workstreams

DST6. Digital Services Support Model

The Digital Services Support Model task's objective is for the Contractor to provide IRCC with the required support and technical expertise to deploy the Permanent Residency Digital solution into production and address critical incidents. A technical support model will be implemented to manage incidents and support activities for the PR platform (including PR Confirmation and PR Intake) functionality, deployed into production and available to the public between November 2020 and March 2021.

Service Level Agreement: Support will be available Monday-Friday between 8 and 4 pm with a 4-hour response time for P1 critical incidents within support hours.

The support model responsibilities are described in Appendix A.

DST7. Digital Services Response : PR Confirmation

The Digital Services Response objective is to support IRCC in reducing the ongoing backlog pressures on Immigration Services. The Contractor and IRCC will continue to work as an integrated team to create simple and easy digital solutions for the PR confirmation stages of the PR application process. This will be conducted in an agile process, starting with the highest priority for the Permanent Resident file.

This tasking consists of deliverables to support the continued development of the Digital Permanent Residency Solution. The integrated Contractor / IRCC team will develop 2 mini-releases for the PR Confirmation Portal to achieve the following business benefits:

- **Enhance security** of the portal including Multi-Factor Authentication (MFA) for case workers and the increase of IRCC security certificates.
- **Improve business process for case workers** through the implementation of additional features, for example, case-editing, additional statuses for cases, pagination, etc.
- **Improve client experience** through the implementation of functionality enhancements and features to better accommodate different user groups, for example, better explanation of next steps, improved accessibility compliance, etc.

The contractor will continue to leverage the Agile delivery methodology and approach, as established on TA7113302 to deliver this work. The current requirements identified as priorities by IRCC include:

Client	Case Worker	System (IT Priorities)
1. Indicate if not in Canada and see clear next steps 2. Notify client via email or text of updates to their case file (a prompt to check their profile) 3. Self-declare that photo is of client/confirming identity 4. Confirmation of case submission modal 5. Indicate how photo taken (professional digital photo, scanned photo or selfie)	6. Create profiles for multiple clients (for head of family or reps to use) 7. Edit case details 8. Edit step status 9. Re-open profiles even after photo submitted for PR card production 10. Preview eCoPR 11. View self-declaration that photo is of client 12. View self-declaration that client is in Canada 13. View detail on how photo taken	14. Automatically delete case history 15. Integration with PR intake initiative (info will be useful for PR confirmation and PR card) 16. Auto sign out due to inactivity 17. Multi-Factor Authentication (case worker) 18. Notify client via email of updates to their case file

As part of early planning activities, the Contractor's preliminary assessment establishes that:

- 11 of the 18 items are planned for Sprint 7 (beginning immediately)
- 6 of the 18 items are potential for Sprint 8 / 9
- 1 of the 18 items requires more analysis and decomposition with the business to accurately size and prioritize (e.g. Profile for Multiple) and is a potential for Sprint 8 / 9 / 10
- The allocation and prioritization for Sprint 8-10 will be confirmed with the business as part of sprint planning
- Sprint 8-10 are planned for reduced development capacity as emphasis shifts to Intake

Upon acceptance of another MVP, the Contractor will follow IRCC's Release Management process and work with IRCC to deploy the digital solution into production. The Contractor must provide the methodology, the approach and the plan to manage and perform all activities required.

DST8. Digital Services Response : PR Intake

This Digital Services Response tasking consists of deliverables that will build upon the success of the PR Confirmation Portal and provide IRCC with further business benefits through digitizing the Permanent Resident Intake process. The development of a Minimal Viable Product (MVP1) for Digital Intake will include the "e-App" type functionality for the highest priority forms (identified below) that cut across all PR lines of business as foundational digitized information capture. There will still be PDF functionality available if clients are required to upload supporting documentation. In addition, the Integrated Contractor/IRCC team will identify one (agreed upon) full line of business to be digitized as a dynamic "e-App" for the end-to-end process (potentially with no PDF forms).

The Contractor will leverage the Agile Delivery Methodology to conduct discovery, build the backlog of requirements/user stories and define the business benefits to be achieved through the development of MVP1. The Contractor will follow IRCC's Release Management process and work with IRCC to deploy the digital solution into production.

The Integrated Contractor / IRCC team will digitize the PR intake process to achieve the following business outcome: Provide a digital intake service for PR clients to submit the application without the need to use paper, snail mail or in-person services. This will be done through the delivery of two key milestones: 1 silent pre-production release and 1 official release (MVP1).

The PR Intake Solution will aim to deliver following business benefits based on the findings and sizing of stories during the Discovery phase:

- Log in to portal – hosted in a protected B environment – using username / password
- Provide foundational information through a digitized form (including data from IMM-0008, IMM-008DE, IMM1344, Schedule A – Background/Declaration [IMM 5669], and IMM5406 – Additional Family Information)
- Upload completed forms and supporting documentation: for submission and get notified that the application has been submitted successfully
- View the status of the application (i.e. received, assigned to officer, returned, rejected, etc.), both from a case worker and a client perspective
- Receive notifications from IRCC to inform clients on the status of their application and potential actions required

The following PR Intake requirements have been identified as part of a preliminary assessment of the functionality to be delivered by the end of February 2021. Specific requirements, prioritization, and implementation approach will be confirmed as part of Discovery.

Degree of Confidence (H,M,L)	Generic Intake Requirements (all lines of business):
<ul style="list-style-type: none"> High High 	<ol style="list-style-type: none"> Secure login for client (username/password and ability to retrieve password) to be able to complete activities over multiple sessions Leverage Protected 8 portal work done by PR Confirmation team to accelerate process and adhere to consistent architecture and security requirements of the Government of Canada Ability to assess the family members as a unit (all information can be linked to the Principal Applicant) Ability to input data blocks through e-forms to auto populate: <ol style="list-style-type: none"> IMM-0008 IMM-008DEP IMM1344 Schedule A - Background/Declaration [IMM 5669] IMM5406 – Additional Family Information IMM5476 – Use of a Representative Ability to link to the checklist/pdf forms for the identified PR line of business – clients to download PDF forms, complete, sign forms Ability for clients to upload completed forms and supporting documentation Ability for clients to receive notification that their application was submitted successfully Ability to directly request missing documents or information from the clients without the need to fully return the application Ability for IRCC to send new documents (i.e. approval letter, landing ceremony invitation, etc.) Ability to view status of applications (i.e. received, assigned to officer, returned, rejected, etc.) – from both a case worker and client perspective Ability to sort applications by various data points (name, UCI know/existing, etc. – as with PR portal) Ability to triage applications received by line of business chosen/submitted by the client for processing by IRCC Work with IRCC to enable the transfer of documents from the portal to IRCC's environment (i.e. cloud, GCDOCs, etc.) Ability for the portal to link with the PR confirmation portal Ability for the portal to meet Treasury Board Secretariat accessibility requirements Ability to return incomplete applications with reason for return Input common data blocks through e-forms to auto-populate specific fields in PDFs forms
<ul style="list-style-type: none"> High – Data points TBC at Discovery High High High High High High High High High Future MVP 	<ol style="list-style-type: none"> End-to-end process for 1 PR Line of Business (To be confirmed) – without reverting to pdf forms

REVISED As of Amendment 6, in addition to the MVP1 release for Client Portal on March 30th, 2021, the contractor will deliver an MVP2 for supporting Case Worker portal by June 4th, and an MVP3 to digitize additional PDF forms by June 4th – IMM 5669, IMM 5406, IMM 5662, and IMM 0008 DEP for 5+ dependents.

Risk Advisory Services

The Contractor must provide advisory services focused on assessing IRCC's existing remote workforce posture, considering the challenges created as a result of COVID-19 and its impact on IRCC's ability to execute its mandate. The output from the initial assessment of the remote workforce posture will inform a refresh of IRCC's cyber security strategy, initially created in 2019. Throughout this work, an emphasis will be placed on reinforcing, improving, and advancing IRCC's digital services and supporting any digital initiatives, in light of the increased cyber security activities in light of COVID-19.

This remote workforce assessment and the cyber security strategy refresh will be influenced by IRCC's working relationship with Canadian Centre for Cyber Security (CCCS) and SSC. Once areas of improvement related to monitoring and/or network infrastructure have been identified, IRCC will need to work with CCCS or SSC to refresh the existing provided scope of services.

RAS1. Remote Workforce and Cyber Security Strategy Refresh

Key Activities:

- Conduct interviews with stakeholders and review documentation related to IRCC's remote workforce posture and existing digital transformation initiatives
- Provide an overview of environmental risks and threats in light of COVID-19
- Development of short- and medium-term recommendations, based on the focus on digital transformation initiatives and immediate remote workforce needs
- Draft updated cyber security strategy roadmap and work packages, highlighting key responsibilities by organization and changes that will directly impact digital transformation initiatives

Deliverables:

- Project plan, outlining the proposed approach for the remote workforce and cyber security strategy refresh
- Summary of the existing remote workforce posture, with the move to a more remote workforce

- Updated cyber security strategy roadmap and work packages, supported by overall recommendations / focus areas tied to digital initiatives and immediate remote workforce needs

REVISED

Technology Advisory Services

IRCC is currently on Oracle Siebel version IP2016 and in order to support digital services needs to investigate the implications and effort to migrate both of their Siebel applications, Grants and Contributions (GCS), and the Global Case Management System (GCMS), to Siebel 2021.xx*. This TA describes the key activities and end result (Deliverables) that will be conducted to complete a diagnostic assessment of work done to date to prepare for the upgrade and assess next steps. It is expected that the work to complete the Diagnostic Report will be conducted over a period of 3 weeks.

Key Activities:

- Upgrade:
 - Assess the documentation of the previous work towards a Siebel upgrade
 - Identify gaps between previously conducted assessment of then-current Siebel version and the new target version
 - Review IRCC's draft Siebel upgrade roadmap for both applications and identify potential gaps, risks, and dependencies
 - 2-3 discussions with the Siebel technical teams and 2-3 discussions with functional/business teams to answer questions about the provided documentation will be required
- Cloud
 - Review IRCC's previous documentation, approach and other materials prepared around a migration of each Siebel application to cloud
 - Conduct a gap analysis of the current work performed against a comprehensive cloud migration roadmap and make recommendations of next steps

Assumptions:

- IRCC will provide requested documentation prior to the start date

Deliverables:

- Diagnostic Report which would include:
 - Identified gaps, risks, and/or dependencies in IRCC's draft Siebel upgrade roadmap
 - Identified gaps, risks, and/or dependencies in IRCC's draft Siebel cloud migration roadmap
 - Recommendations for next steps to prepare for the Siebel upgrade of both applications and cloud projects

Following the completion of the Diagnostic Report, we propose an alignment on the following future deliverables to support IRCC in finalizing the plans for the Siebel upgrade. The Technology Advisory Services Planning Deliverables, would include the following:

- Upgrade Assessment Refresh
- Updated Siebel upgrade roadmap
- Updated cloud migration roadmap
- Upgrade project charter

Change Management

The contractor will support the Transformation Change Management Office (TCMO) to develop a program level change management approach, function model (interaction model across the Transformation Programme, levers and CM hub), and a toolkit to deliver change.

CM1. Transformational Change Management Office Strategy & Implementation Plan

Outcomes:

- Consistent and adaptable approach to serve change management needs across the transformation programme
- Measurable and consistent approach to monitoring change (KPIs for readiness, adoption and change activities effectiveness)
-

Key Activities:

- Case for Change Canvas Session
- Develop components of change strategy
- Review existing OCM documentation for an understanding of current CM practices

Deliverables:

- Change Management Strategy
 - Proposed high-level approaches for the following:
 - Change Impact Assessing and Reporting
 - Communications and Stakeholder Engagement
 - Change Readiness Assessments and Reporting
 - Learning & Capability Needs Assessment
- TCMO Implementation Plan (launch plan)

CM2. Transformational Change Management Office Function Model

Outcomes:

- Objectives, goals and consistent messaging for the TCMO function
- Define partnership with CM hub
- Define working model with Transformation Programme – including levers

Key Activities:

- Interviews with key leaders to inform goals, mandate and objective of TCMO
- Workshop with levers to understand needs to inform service offering and interaction model Workshop with Transformation Programme to understand requirements and share initial thinking and proposed models
- Workshop with working group to review and discuss different interaction and service model options
- Design high-level TCMO roles and responsibilities supporting the interaction model

Deliverable:

- TCMO Function Design PowerPoint Document including:
 - TCMO objectives, mandate and goals
 - High Level structure including roles and responsibilities
 - TCMO interaction model with other levers
 - TCMO service offering delivery model (including Transformation Programme and partnership with CM Hub)

CM3. Transformational Change Management Office Toolkit

Outcomes:

- Future view of TCMO toolkit to deliver change management activities across the levers.

Key Activities:

- Assessment activity to review existing tools
- Share standard tools and templates to help drive standardization and adoption
- Workshop to present industry practices and approach of tools / templates shared

Deliverable:

- 3-4 CM tool templates
- Workshop output

As of Amendment 4, in addition, the contractor will support TCMO to implement their new service delivery model to serve the CM needs across the Digital Transformation Programme. The support will be focused in two work areas, co-delivery on the immediate CM needs on the Programme Roadmap, and for Deloitte to develop and deliver a CM Roadmap across the Programme initiatives.

CM4. Co-Delivery of CM Support to TCMO Clients

Outcomes:

- Capacity and capability to deliver / execute on CM needs for the programme
- Knowledge Transfer and Change delivery Capability building to TCMO team members

Key Activities:

- Leveraging the TCMO Service Delivery Model and Change Management Approach, to support TCMO in hitting the ground running early January in order to co-deliver on Change Management for Digital Journey Lab #3
- Support TCMO delivery of Key activities as part of the 'Define Success' phase within the Change Management approach for projects other than DJL Lab#3. Key activities as part of the 'Define Success' phase include:
 - Change Initiation Form and Lever Leadership Interview
 - Initial Change Canvas Session
 - Persona Assessment
 - Leadership Alignment interviews
 - Change Metrics Assessment
- Enterprise Change Management Branch Canvas Session
 - Conduct a Canvas session to support the ECMB to align on model and coalition vision

Deliverable:

- DJL Lab #3 Change Roadmap and execution during engagement duration.

CM5. Transformation Programme CM Roadmap

Outcomes:

- CM Initiation and CM Roadmap for the Transformation Programme Office
- Impacted stakeholders identified across the programme

- Preliminary view of changes / impacts across the Programme
- Integrated view of CM activities across the Transformation Programme

Key Activities:

- Development of CM Roadmap for each lever with a preliminary view of change activities across the lever initiatives (against Jan 2021 Digital Transformation Programme Roadmap).
- Partnering with Transformation Programme Office to develop metrics and capability building required to deliver on the digital strategy
- Development of CM Roadmap for the Transformation Programme Office

Deliverable:

- Transformation Programme CM Roadmap

Innovation and Experimentation

Key Activities

Conduct kick-off to align on objectives, stakeholder engagement and gather documentation related to current RPA capabilities and PoCs.

- Develop RPA Vision and Guiding Principles:
 - Conduct an RPA Workshop for the IRCC team to define the vision and guiding principles and discuss options for operations (e.g. enterprise vs corporate services approach). Include, at the IRCC's direction, stakeholders from other Branches across IRCC affected by the automation strategy
 - Based on workshop input, develop an artifact that outlines IRCC's vision for RPA and guiding principles
 - Define and validate RPA Program objectives
- Define Sustainment and Operating Model:
 - Define operating model type and structure (Centralized vs. Decentralized vs. Hybrid)
 - Define and document at a high-level the roles, responsibilities, skills and capabilities required to manage and operate each function within the operating model:
 - Guidance on required strategic Advisory Functions
 - **Leadership Integration:** set the strategy and vision for Automation and act as the integration point between groups
 - **Automation Management:** plan and drive progress; ensure alignment to the vision; and report to leadership
 - Guidance on required automation Delivery Functions
 - **Release and Integration Planning & Coordination:** Guidance on how to plan individual releases and engage stakeholders at the management level with consideration to existing release management processes at IRCC
 - **Change Management & Communications:** minimize workforce impacts and ensure workforce transition
 - **Automation Performance and Benefits Tracking:** define key performance measures, and track / report on benefit realization
 - **Process Intake:** select processes for automation that possess strong business value, and maintain pipeline for future releases
 - **Process Optimization:** execute process changes to optimize a process to enable automation or extend the scope of automation

s.20(1)(b)

- **Automation Releases:** deliver the automated solution to production (which involves the design / build / testing & Review / deployment)
- **Automation Support & Maintenance:** conduct incident management, managing robot capacity, and scheduling including IRCC integration points.
- **Automation Operations:** support with day-to-day operations, including workload management and exception handling

- Develop Resource Plan:
 - Based on the operating model, identify staffing options for these roles (i.e., how will these roles be staffed - internal vs. contractor) for Year 1 of the RPA Program
- Develop RPA process for TR-PR PoC with production ready code
 - Configure and unit test solution according to requirements defined by IRCC
 - Conduct QA testing and validate solution functionality is Production ready

2. PERIOD OF SERVICES	FROM (DATE): August 18, 2020 TO (DATE): June 18, 2021
3. Work Location:	N/A – All work to be conducted remotely.
4. Invoice sent to:	FINInvoices-FacturesFIN.IRCC@cic.gc.ca [send copy of invoice to: carole.holden@tpsgc-pwgsc.gc.ca]
5. Travel Requirements:	N/A – All work to be conducted remotely.
6. Language Requirements:	English.
7. Other Conditions / Constraints:	N/A.
8. Level of Security Clearance Required for the Contractor Personnel:	Reliability Status.

9. Contractor's Response:

Please see beginning of response details on next page.

9.1 Milestone/Deliverable and Payment Schedule

Milestone/Deliverable	Delivery Week	Firm Price Amount
DST – Sprint 1 – Discovery & Backlog Development (DST1-DST4)	11-Sep-20	
RAS D1. Detailed Project Plan for Remote Workforce Security Review and Cyber Security Strategy and Roadmap Refresh	20-Nov-20	
RAS D2.1 Preliminary Summary of Remote Workforce Security Posture	11-Dec-20	
DST – Sprint 2 and 3 – Development (DST1-DST4)	9-Oct-20	
CM D1. Change Strategy	18-Dec-20	

RAS D2.2 Final Summary of Remote Workforce Security Posture	18-Dec-20	
RAS D3. Updated Cyber Security Strategy and Roadmap	12-Feb-21	
DST – Sprint 4 and 5 – Development (DST1-DST4)	6-Nov-20	
CM D2. Interaction Model	11-Dec-20	
CM D3. Change Toolkit	20-Nov-20	
CM – DJL Lab #3 Change Roadmap	5-Mar-21	
CM – Transformation Programme CM Roadmap	31-Mar-21	
DST – Sprint 6 and 7 – Development & Hypercare, User Research / Testing & Next Steps (DST1-DST4)	7-Dec-20	
DST – December – PR Intake Discovery, PR Confirmation Sprint 7 and mini-release, PR Support (0 P1 Critical Incidents Open) (DST6-DST8)	31-Dec-2020	
DST – January – PR Intake Sprint 1-2 and silent release, PR Confirmation Sprint 8-9, PR Support (0 P1 Critical Incidents Open) (DST6-DST8)	31-Jan-2021	
DST – April – Sprint 3-6 – PR Intake MVP2 development and testing, Release readiness, PR Support (0 P1 Critical Incidents Open) (DST6 – DST8)	04-Jun-2021	
DST – April – Sprint 7-8 - PR Intake MVP2 release and hypercare, PR Support (0 P1 Critical Incidents Open) (DST6-DST8)	04-Jun-2021	
Oracle Siebel Diagnostic Report	22-Jan-2021	
Technology Advisory Services Planning Deliverables	12-Mar-2021*	
NEW RPA Vision and Guiding Principles	04-16-2021	
NEW RPA Sustainment and Operating Model	05-07-2021	
NEW RPA Resourcing Plan	05-14-2021	
NEW RPA Developer support	06-18-2021	
NEW DST: DST – May release – Sprint 8-10 PR Intake MVP3 development,	04-Jun-2021	

release and hypercare, PR Support (0 P1 Critical Incidents Open) (DST6-DST8)		
Total		\$5,048,500 \$5,224,260 \$5,414,260 \$5,499,260

* *dates* indicate tentatively planned dates requiring IRCC resource availability confirmation

Deliverable and Milestone Inspection and Acceptance: The Project Lead, on behalf of the Technical Authority, will inspect and accept the deliverables (as outlined in section 1) and milestones within 3 business days of submission from the Contractor, prior to payment processing.

9.2 Total Cost

Cost breakdown:

Deloitte understands that only Name, PWGSC Security File Number, and Date of Birth is required to be provided for future additional resources.

Please refer to Deloitte_TA7113302_B9220-210014-001_Resource_Update_2020-10-07.xlsx for details of resources added to this Task Authorization.

Category and Name of Proposed Resource	PWGSC Security File Number	Firm Per Diem Rate	Estimated # of Days	Total cost
- A.6 Programmer / Software Developer - Level 2				
- P.5 Project Executive - Level 3				
- P.5 Project Executive - Level 3				
- P.5 Project Executive - Level 3				
- P.5 Project Executive - Level 3				
- P.5 Project Executive - Level 3				
B.3 Business Consultant - Level 2				
- P.5 Project Executive - Level 3				
- B.3 Business Consultant - Level 2				
- B.3 Business Consultant - Level 2				
- P.5 Project Executive - Level 3				
- P.5 Project Executive - Level 3				
- B.3 Business Consultant - Level 2				
- B.3 Business Consultant - Level 2				
- P.5 Project Executive - Level 3				

- P.5 Project Executive - Level 3	
- A.6 Programmer / Software Developer - Level 2	
- B.3 Business Consultant - Level 3	
- I.11 Technology Architect - Level 3	
- P.5 Project Executive - Level 3	
- P.8 Project Leader - Level 3	
- P.5 Project Executive - Level 3	
B.3 Business Consultant - Level 3	
- A.1 Application Software Architect - Level 3	
- P.2 Enterprise Architect - Level 3	
B.3 Business Consultant - Level 3 (This position will be filled at a later date via a TA amendment)	
- B.3 Business Consultant - Level 2	
- B.3 Business Consultant - Level 2	
- B.3 Business Consultant - Level 2	
- B.3 Business Consultant - Level 2	
- A.6 Programmer / Software Developer - Level 1	
- A.6 Programmer / Software Developer - Level 1	
- B.3 Business Consultant - Level 1	
B.3 Business Consultant - Level 1 (This position will be filled at a later date via a TA amendment)	
B.3 Business Consultant - Level 1 (This position will be filled at a later date via a TA amendment)	
B.3 Business Consultant - Level 1 (This position will be filled at a later date via a TA amendment)	
- B.3 Business Consultant - Level 1	
- B.3 Business Consultant - Level 1	
- B.3 Business Consultant - Level 1	
- B.3 Business Consultant - Level 1	
B.3 Business Consultant - Level 2	
- B.3 Business Consultant - Level 1	
B.3 Business Consultant - Level 1 (This position will be filled at a later date via a TA amendment)	
B.3 Business Consultant - Level 2 (This position will be filled at a later date via a TA amendment)	

B.3 Business Consultant - Level 2 (This position will be filled at a later date via a TA amendment)		
- B.3 Business Consultant - Level 1		
B.3 Business Consultant - Level 2 (This position will be filled at a later date via a TA amendment)		
B.3 Business Consultant - Level 1 (This position will be filled at a later date via a TA amendment)		
B.3 Business Consultant - Level 1 (This position will be filled at a later date via a TA amendment)		
B.3 Business Consultant - Level 1 (This position will be filled at a later date via a TA amendment)		
B.3 Business Consultant - Level 2 (This position will be filled at a later date via a TA amendment)		
B.3 Business Consultant - Level 1 (This position will be filled at a later date via a TA amendment)		
B.3 Business Consultant - Level 1 (This position will be filled at a later date via a TA amendment)		
Sub-Total		\$5,508,200.00 \$5,745,090.00 \$5,786,090.00
Adjustment to reflect fixed price milestones / deliverables for this TA (July 2020)	\$	(94,930.00)
Adjustment to reflect fixed price milestones / deliverables for this TA (November 2020)		\$(189,010)
Adjustment to reflect fixed price milestones / deliverables for this TA (May 2021 – Amendment 6)		\$(1,890)
Adjustment to reflect fixed price milestones / deliverables for this TA (May 2021 – Amendment 7)		\$(1,000)
	Sub-Total of TA (Taxes Extra) (A):	\$5,048,500.00 \$5,224,260.00 \$5,459,260.00 \$5,499,260.00
	Applicable Taxes (B):	\$756,012.88 \$782,332.94 \$817,524.19 \$823,514.19
	Total Cost of TA (Taxes included) (C= A + B):	\$5,804,512.88 \$6,006,592.94 \$6,276,784.19 \$6,322,774.19

9.3 Key Contractor Assumptions and Dependencies

- Assumptions

- This work will be delivered at a firm fixed price as per the milestone / deliverable payment schedule above. The total fixed price is reflective of ~~\$5,786,090.00~~ ~~\$5,459,260.00~~ ~~\$5,224,260.00~~ ~~\$5,048,500.00~~ sub-total of the TA and ~~\$823,514.19~~ ~~\$817,524.19~~ ~~\$782,332.94~~ ~~\$756,012.86~~ in applicable taxes (based on a tax rate of 14.975%). This results in a total fixed price of ~~\$6,322,774.19~~ ~~\$6,276,784.19~~ ~~\$6,006,592.94~~ ~~\$5,804,512.86~~.
- The cost breakdown provided is reflective of estimated effort and assumptions at the time of TA submission. Actual hours may vary from these estimates over the course of delivery, but will not impact the price to deliver the scope described in this fixed price TA
- The start date for this work will be the week of August 18, 2020

- The end date for this TA will be **June 18, 2021** to allow additional time for deliverable acceptance
- **Completion Date** The work will be completed between August 18, 2020 and **June 18, 2021** and required IRCC stakeholders will be available to support this phase of work
- Activities and deliverables will be completed in collaboration with IRCC
- IRCC will identify the stakeholders to attend any information sessions and meetings
- Work will be conducted remotely via telephone and videoconferencing as appropriate
- For each of the workstreams, Deloitte and IRCC will confirm the deliverable sign-off process as part of the first week of work on this TA. This will include identifying who from IRCC will provide approval for each workstream / deliverable.
- Deliverables and work products (i.e., presentation material, tools and templates) will be provided in English. Translation, if required, will be provided, in a timely manner, by IRCC.
- Completion of the work within this TA will not preclude Deloitte from providing support to additional IRCC initiatives and priorities.
- Deloitte will not have access to live production data
- **NEW:** Deloitte offices will be closed between December 24 and January 4. Limited support will be available for P1 Critical support incidents via a process to be confirmed with IRCC

Workstream 1 – Digital Transformation Services – Assumptions

- As part of Sprint 1 and Sprint 2 – Deloitte will work with IRCC to confirm the release schedule and approach. For each of sprints 3-6, Deloitte will produce production-ready MVP and functionality, and will work with IRCC to confirm when the functionality will be deployed to production
- Deloitte and IRCC will work together on Sprint Planning for Release 1. This includes the scope of each MVP after each sprint and the viability of a production-ready MVP to achieve a business objective
- IRCC will be responsible for facilitating any SA&A process steps and / or security authorities to operate
- IRCC will be responsible for defining and executing the deployment process for the production-ready code as per their standard procedures, governance, etc.
- IRCC will be responsible for identifying impacts of the MVP to current processes and providing training, communications, change management, job aids, etc. to users to facilitate the deployment and drive adoption of the service
- IRCC will be responsible for gathering any current state performance metrics related to current processing in order to facilitate any benefits tracking and reporting that may be required for the digital service
- The Deloitte support service hours are 8 am ET to 4pm ET, Monday to Friday with a 4-hr response time for P1 Critical incidents within support hours. Responses between December 24 – January 1 may be delayed. Deloitte will work with IRCC to confirm and align on support coverage requirements and expectations during this period
- **NEW:** The solutions developed as part of the Digital Transformation Services stream will be stand-alone and will not be integrated to existing IRCC systems (e.g. GCMS).
- **NEW:** As part of PR Intake MVP2 for Case Worker portal, functionality will include validation and generation of 2D barcodes from IMM 0008 to facilitate the uploading of information into GCMS. IRCC will be responsible for providing access to appropriate GCMS environments for development and testing. Alternatively, IRCC will provide access to IT and business users who can support the testing of 2D barcode generation and uploading into GCMS.
- **Design Pod:**
 - As it relates to the design / user-research stream:
 - Deloitte will...
 - Be the process owner as it relates to all user research and validation
 - Be the content owner on all user research protocols and processes

- Support stakeholder outreach, including development of engagement materials and/or communications (as it relates to any research with internal IRCC research participants)
 - Ensure consistent and meaningful knowledge sharing between Deloitte and IRCC
- IRCC will...
 - Following standard practice in research, participants will be provided with a one-time compensation for their time in the form of cash or cash equivalent (details to be agreed upon between Deloitte and IRCC).
 - Commit to devoting time and resources to supporting the project
 - Provide ready access to colleagues, expertise, and information connected to the user research
 - Own stakeholder interview logistics, planning and coordination as they relate to any internal stakeholders
 - Attend proposed meetings and provide feedback in a timely manner as it relates to research processes and protocols
- **Build & Technical Pod:**
 - NEW: Deloitte will:
 - Own the sizing of user stories based on technical expertise and complexity associated to the desired functionality
 - Own the development and co-review testing of each story
 - Develop and manage a quality assurance strategy to enable IRCC to test system integration, security, legal, accessibility and overall functionality of the solution from the end-user viewpoint
 - Support IRCC to sign-off on Quality Assurance decisions and prioritization of bugs to be fixed within the agreed upon timeline
 - Ensure consistent and meaningful knowledge sharing between Deloitte and IRCC
 - Support IRCC in standing up the support model and manage the support activities for the solutions deployed to production
 - IRCC will:
 - Provide a dedicated PO who has the ability to make decisions and will help liaise with those at IRCC required for meetings, sign-offs, etc.
 - PO to prioritize stories which should consider technical requirements
 - Provide confirmation on the technical architecture and infrastructure
 - Provide technical capabilities / resources to answer questions related to tech stack, platform, environments, etc. – this person does not need to be dedicated but does need to be able to provide significant time and will need to have an understanding of existing databases, integrations, existing APIs, etc. (although the web app is meant to be stand alone, there will be components that rely on existing data)
 - Provide the right decision makers / owners to determine requirements and solidify the MVP scope; scope should take into account technical requirements
 - Sign off on designs before they are developed – we cannot develop designs that do not have sign off; if changes are required post sign-off they will be added to the backlog and be prioritized by the PO
 - Confirm technical assumptions
 - Provide security requirements (e.g. audit logs given PII data, etc.) that should be part of the MVP; if security requirements are being omitted from the MVP, IRCC to provide sign-off on these decisions
 - Set-up dev and staging environments ahead of start date

- Ensure development pipeline is set-up
- Identify resource who will be responsible for deploying code to Production (Deloitte tech lead / developers can be on the phone, etc. but cannot actually submit the code for production)
- Commit to devoting time and resources to discovery workshops and throughout the development sprints as additional clarification is required
- Develop the go-live support documentation which includes the authority to operate documentation, Go/no-go decision criteria, release strategy and departmental approvals
- Perform security testing, performance testing, agent training / communications / change management, public / media communications, etc. In support of go/no-go decision criteria (consistent with approach to PR Confirmation MVP1)

Workstream 2 – Risk Advisory Services – Assumptions

- IRCC will provide consent and coordinate introductions for Deloitte to discuss with other supplier Government of Canada departments (incl. ESDC, SSC, TBS, etc.) in support of this assessment

- Workstream 3 – Technical Advisory Services – Assumptions

- Deloitte will have access to the IRCC Siebel test environment to facilitate the review
- During this period, we expect to run 10 - 15 virtual workshops/sessions, ranging from 1 – 3 hrs, with stakeholders identified below to gather information, obtain clarifications and share findings
- Deloitte will produce an executive briefing deck (PPTX) based on the findings of the assessment
- Activities and deliverables will be completed in collaboration with IRCC.
 - Access to Siebel documentation for the current IRCC implementation
 - Access to the testing environment
 - Understanding of the Production environment Architecture Diagram and review of set-up will be required on week 1
 - Understanding of the current servers' licensing model will be required on week 1
 - Outcomes from this activity will provide an assessment of the current architecture and application configuration of the IRCC Siebel Implementation
 - A roadmap for future activities will be created outlining the timelines for the upgrade from IP2016 to Siebel 2019
- IRCC will identify the stakeholders to attend any information sessions and meetings.
 - At a minimum, the following resources will be available to attend sessions, meetings and address questions as they arise: IRCC technical team Technical architect, Siebel administrators, Siebel developer, Integration team, Database administrator, Tester, Release manager others to be identified as needed
- When working in agile, not all information is available early, the DJL Lab#3 Change Plan will be as detailed as per information available at the time of the engagement

Workstream 4 – Change Management Services – Assumptions

- IRCC will identify their internal requirements for OCM resourcing
- Subject Matter Experts will be available to attend meetings, working sessions and other activities per project plan
- Project Leadership will be available to aid in identifying key stakeholders
- IRCC will provide background documentation to Deloitte to assist with determining the current state
- Documentation and materials will be developed in English and all required translation of materials will be arranged by IRCC

s.19(1)

- Conduct 5-7 stakeholder interviews for data gathering and alignment
- Facilitate 1-2 Change Canvas working sessions with IRCC stakeholders

- **Workstream 5 – Innovation and Experimentation – Assumptions**

- Our fixed fee is based on the estimated effort and informed by our understanding of IRCC's needs and the underlying assumptions in our proposed approach
- IRCC staff assigned to the Project will be able to represent IRCC's business and technical requirements and will be empowered to make decisions related to the scope of their role on the Project
- Developers will be granted access to all relevant environments to complete configuration by IRCC; delays to access may necessitate a revision of scope via a change request

- **Dependencies**

- Some team member names (as identified in the table above) are dependent on confirming the solution stack and timing of activities (during weeks 1 and 2). The cost table above is reflective of effort estimates and resource type.
- Digital Transformation Roadmap – the CM Roadmap will be based on initiatives identified on the current Transformation Roadmap
- Implementation of the TCMO Function model is dependent on its approval

10. Contractor's Signature	
Name, Title and Signature of Individual Authorized to Sign on Behalf of Contractor <div style="text-align: center;">Shannon Kot</div> (type or print)	Signature: _____ Date: <u>June 3, 2021</u>
11. Approval – Signing Authority	
Signatures (Client)	
Name, Title and Signature of Technical Authority to Sign on Behalf of CIC (type or print)	<div style="text-align: right;"> Digitally signed by Subhani, Omar Date: 2021.06.04 14:59:37 -04'00' </div> Signature: <u>Subhani, Omar</u> Date: _____
Name, Title and Signature of CIC Procurement Representative to Sign on Behalf of CIC (type or print)	<div style="text-align: right;"> Digitally signed by Strangemore, Jessica Date: 2021.06.07 09:55:30 -04'00' </div> Signature: <u>Strangemore, Jessica</u> Date: _____
Signatures (PWGSC)	

<p>Name, Title and Signature of *Contracting Authority to Sign on Behalf of Public Works and Government Services Canada</p> <p>(type or print)</p>	<p>Digitally signed by: Holden, Carole Date: 2021.06.07 11:37:36 - 04'00'</p> <p>Signature: <u>Carole Holden</u></p> <p>Date: _____</p>
<p>You are requested to sell to her Majesty the Queen in Right of Canada, in accordance with the terms and conditions set out herein, referred to herein, or attached hereto, the services listed herein and in any attached sheets at the price set out there of.</p>	

AMENDMENT NO: 8

APPENDIX B TO ANNEX A TASK AUTHORIZATION FORM

TASK AUTHORIZATION (TA) FORM			
Contractor:	DELOITTE INC.	Contract Number:	B9220-210014/001/ZM
Commitment Number (PR#):	153613	Financial Coding:	0500-0140-6762-54080-9220-9998
Task Number:	7113302 TA 01	Amendment Number:	008
Issue Date:		Response required by:	
1. STATEMENT OF WORK (WORK ACTIVITIES, CERTIFICATIONS AND DELIVERABLES)			
<p>NEW</p> <p>Amendment #008 is raised to:</p> <ul style="list-style-type: none"> Extend Deloitte services for Digital Services Response workstream for Analysis and Design for next phase of work Extend Digital Services Support Model for live PR Digital products Increase the value of the TA by \$428,000 (exclusive of tax) in new Deliverable/Milestones for Digital Services Response workstream 			
<p>NEW</p> <p>Amendment #007 is raised to:</p> <ul style="list-style-type: none"> Amend the Deliverable/Milestones dates for Workstream 5 – Innovation & Experimentation Increase the value of the TA by \$40,000 (exclusive of tax) for extended timeline for Deliverable/Milestone Correct milestone total from previous amendment 			
<p>NEW</p> <p>Amendment #006 is raised to:</p> <ul style="list-style-type: none"> Amend the Deliverable/Milestones for Workstream 1 - Digital Service Response Increase the value of the TA by \$235,000 (exclusive of tax) for new Deliverable/Milestone 			
<p>NEW</p> <p>Amendment #005 is raised to:</p> <ul style="list-style-type: none"> Amend the Description of the Project/Work required for the Innovation & Experimentation Workstream Revise deliverables and respective schedule for the Innovation & Experimentation Workstream No change to TA value 			
<p>NEW</p> <p>Amendment #004 is raised to:</p> <ul style="list-style-type: none"> Extend Deloitte services to deliver Change Management support against the TA01 for the Transformation Change Management Office (TCMO) Increase the value of the TA by \$175,760.00 (exclusive of tax) in new Deliverable/Milestones for Workstream 4 – Change Management 			
<p>NEW</p> <p>Amendment #003 is raised to:</p> <ul style="list-style-type: none"> Amend the Description of the Project/Work required (highlighted in yellow) Revise deliverables and their respective schedule 			

Amendment #002 was raised to:

- **Amend the Description of the Project/Work required**
- **Extend the end date of the TA**
- **Increase the value of the TA by \$2,500,000.00 plus \$374,375.00 in applicable taxes for a total increase amount of \$2,874,375.00**
- **Add a Milestone/Deliverable and revise existing Milestones and their respective schedule.**

Amendment 002 focuses on the Digital Services Response work stream and includes several work packages to achieve the overall objectives to satisfy Ministerial commitments for the PR file and continue to enable IRCC to respond to the ongoing pandemic pressures

Amendment #001 was raised to:

Revised Delivery Weeks for the following Work Streams

- **Risk Advisory Services (RAS)**
- **Technology Advisory Services (TAS)**
- **Change Management (CM)**
- **Innovation and Experimentation (IE)**

New and Revised content to Section 1. Statement of Work for the following areas:

- **Change Management (CM)**

.....
Description of the Project / Work Required:

Digital Service Transformation- Emergency Response to COVID-19

Immigration, Refugees and Citizenship Canada (IRCC) is seeking the services of a global organization(s) (the "Contractor") with expertise in rapidly developing and implementing Digital solutions and supporting technologies in response to the recent global pandemic. COVID-19 has increased the urgency for IRCC to develop updated (i) new strategies, and (ii) processes and digital systems to cope with the rapid change it is undergoing. These include updating systems and processes for internal staff, re-thinking and re-designing how IRCC provides its services to its clients within Canada and around the world, leveraging digital processes wherever possible thus minimizing the need for in-person interaction or paper-based processes for the safety of IRCC's staff, clients and community.

The scope of this Task Authorization is to work with IRCC to support this Digital Services Response project through several complementary work streams. This includes the execution of critical activities in a timely and efficient manner by leveraging leading practices and advanced technologies.

This Task Authorization has five primary work streams to achieve the overall objectives for the CIO Organization:

- **Digital Services Response**
- **Risk Advisory Services**
- **Technology Advisory Services**
- **Change Management**
- **Innovation and Experimentation**

The focus of Amendment 02 is on the Digital Services Response work stream and includes the following work packages to achieve the overall objectives to satisfy Ministerial commitments for the PR file and continue to enable IRCC to respond to the ongoing pandemic pressures:

- **Digital Services Support Model**
- **Digital Services Response: PR Confirmation**
- **Digital Services Response: PR Intake**

Background

On March 11, 2020, the World Health Organization (WHO) declared the newly discovered Corona virus (COVID-19)

as a global pandemic. With COVID-19, rapidly spreading and creating serious health threats across the globe, citizens, businesses, and governments are significantly disrupted creating an unprecedented economic impact.

The Government of Canada has taken unprecedented action in an effort to slow the spread of this virus. It has implemented significant international travel restrictions, significantly reduced in-person interactions with Government personnel, recalled citizens and staff from abroad and implemented strict guidelines for physical distancing and remote working. IRCC provides a critical array of services in support of temporary residents (temporary foreign workers, international students and visitors), permanent residents, citizenship seekers, refugees and asylum claimants and directly to Canadian citizens for passports and other travel documentation. Many of the above programs are currently supported by in-person or paper-based processes. Those processes that do include some automation are supported by aging IT systems that are not readily able to be adapted to support this new way of working or at the pace of change required to respond to the rapidly evolving response to the COVID-19 emergency... Success requires establishing a rapid capacity for change through immediate actions. Digital services strategies are required to facilitate a simplified, digitally enabled experience to improve productivity, while providing for new digital channels that will empower clients and applicants to carry out quicker processes easily, securely and conveniently.

TASKS

Digital Services Transformation

The Digital Services response objective is to support IRCC in reducing the backlog and pressures on Immigration Services. The Contractor and IRCC will work as an integrated team to create simple and easy digital solutions across the application process for all types of visa applications. This will be an agile process, starting with the highest priority for the Permanent Residency file. All deliverables in this section are based on the scope of the first Minimal Viable Product (MVP) which is the web-based release for Permanent Residency Intake.

This stream consists of the following 5 interdependent work packages as described below:

- DST1. Digital Intake Solution for Permanent Residency**
- DST2. Digital Architecture/Platform and Business Capability Model**
- DST3. Permanent Residency Release Roadmap**
- DST4. Agile Methodology and Governance**
- DST5. Proof Of Concept (POC) Chatbot**

DST1. Digital Intake Solution for Permanent Residency (responsive web service)

The Contractor must develop digital intake solutions that will provide the ability to accept IRCC clients for Permanent Resident applications. The Contractor will develop a series of Minimal Viable Products (MVPS) based on an Agile Methodology. Upon acceptance of an MVP, the Contractor will follow IRCC's Release Management process and work with IRCC to deploy the digital solution into production. The Contractor must provide the methodology, the approach and the plan to manage and perform all activities required.

Key Activities:

- Work an integrated team leveraging Agile Methodology and Delivery Approach with 2-week Sprints
- Creation of Project Plan and Backlogs
- Human Centered Design
- Creation of Production-Ready Digital Intake Solution as MVPs
- Integration with Cloud based Digital Platforms

Deliverables:

- Web Based Release for Permanent Residency Intake

DST2. Digital Architecture/Platform and Business Capability Model

Key Activities:

- Work with IRCC to deliver Technology Debt Reduction (TDR) outcomes
- Review IRCC Digital Platform Roadmap to reflect the impact of COVID-19
- Assess current TBS Digital Government policies in relation to IRCC services mandate
- Conduct Technology Options Analysis – Digital, Cloud, Disruptive and Emerging Technologies
- Work with IRCC, TBS and Shared Services Canada (SSC) on Enterprise Architecture Outcomes

Deliverables:

- Digital Architecture Strategy for Immigration Services
- Business Capability Modelling for Operations, IT/IM and Digital Services

DST3. Permanent Residency Release Roadmap

Key Activities:

- Review IRCC standard practices and release management
- Conduct interviews with senior leadership to evaluate potential release management approach
- Develop detailed multi-speed release management framework
- Conduct validation session, senior leadership across Digital, Operations and Programs, to refine the release management framework
- Build Release Roadmap for the Permanent Residency Digital Intake Solution and work plan defined as part of DST1.

Deliverables:

- Digital Solutions release framework and approach
- 12-month Permanent Residency Application release roadmap, beyond the MVP

DST4. Agile Methodology and Governance

Key Activities:

- Work with IRCC to build and prioritize backlog
- Discovery to perform user research, define features, build a high-level story map
- Scoping and analysis to define MVP of features, refine story map, design digital architecture, and confirm release and sprint plan.
- Delivery, including integration of test environments, design and build of functionality, testing functionality, conducting user testing and validation, and providing DevOps support.
- Release to production, conduct stakeholder review, facilitate feedback session, communicate to stakeholders

Deliverables:

- Delivering Agile Methodology & Governance approach to accelerate the Digital Service Transformation that IRCC needs due to COVID-19

DST5. POC Chatbot

Key Activities:

- Work with IRCC to confirm the scope of the chatbot by identifying the top questions (i.e., intents and answers) that the chatbot should be able to answer
- Review the current platform and confirm technology viability and feasibility
- Work with IT and Communications to prepare for public launch of minimum viable chatbot
- Deploy into production, monitor and support

Deliverables:

- Develop minimum viable (text only) chatbot

Digital Services Response Workstreams

DST6. Digital Services Support Model

The Digital Services Support Model task's objective is for the Contractor to provide IRCC with the required support and technical expertise to deploy the Permanent Residency Digital solution into production and address critical incidents. A technical support model will be implemented to manage incidents and support activities for the PR platform (including PR Confirmation and PR Intake) functionality, deployed into production and available to the public between November 2020 and March 2021.

Service Level Agreement: Support will be available Monday-Friday between 8 and 4 pm with a 4-hour response time for P1 critical incidents within support hours.

The support model responsibilities are described in Appendix A.

DST7. Digital Services Response : PR Confirmation

The Digital Services Response objective is to support IRCC in reducing the ongoing backlog pressures on Immigration Services. The Contractor and IRCC will continue to work as an integrated team to create simple and easy digital solutions for the PR confirmation stages of the PR application process. This will be conducted in an agile process, starting with the highest priority for the Permanent Resident file.

This tasking consists of deliverables to support the continued development of the Digital Permanent Residency Solution. The integrated Contractor / IRCC team will develop 2 mini-releases for the PR Confirmation Portal to achieve the following business benefits:

- **Enhance security** of the portal including Multi-Factor Authentication (MFA) for case workers and the increase of IRCC security certificates.
- **Improve business process for case workers** through the implementation of additional features, for example, case-editing, additional statuses for cases, pagination, etc.
- **Improve client experience** through the implementation of functionality enhancements and features to better accommodate different user groups, for example, better explanation of next steps, improved accessibility compliance, etc.

The contractor will continue to leverage the Agile delivery methodology and approach, as established on TA7113302 to deliver this work. The current requirements identified as priorities by IRCC include:

Client	Case Worker	System (IT Priorities)
1. Indicate if not in Canada and see clear next steps	6. Create profiles for multiple clients (for head of family or reps to use)	14. Automatically delete case history
2. Notify client via email or text of updates to their case file (a prompt to check their profile)	7. Edit case details	15. Integration with PR intake initiative (info will be useful for PR confirmation and PR card)
3. Self-declare that photo is of client/confirming identity	8. Edit step status	16. Auto sign out due to inactivity
4. Confirmation of case submission modal	9. Re-open profiles even after photo submitted for PR card production	17. Multi-Factor Authentication (case worker)
	10. Preview eCoPR	18. Notify client via email of updates to their case file

5. Indicate how photo taken (professional digital photo, scanned photo or selfie)	11. View self-declaration that photo is of client 12. View self-declaration that client is in Canada 13. View detail on how photo taken	
<p>As part of early planning activities, the Contractor's preliminary assessment establishes that:</p> <ul style="list-style-type: none"> 11 of the 18 items are planned for Sprint 7 (beginning immediately) 6 of the 18 items are potential for Sprint 8 / 9 1 of the 18 items requires more analysis and decomposition with the business to accurately size and prioritize (e.g. Profile for Multiple) and is a potential for Sprint 8 / 9 / 10 The allocation and prioritization for Sprint 8-10 will be confirmed with the business as part of sprint planning Sprint 8-10 are planned for reduced development capacity as emphasis shifts to Intake <p>Upon acceptance of another MVP, the Contractor will follow IRCC's Release Management process and work with IRCC to deploy the digital solution into production. The Contractor must provide the methodology, the approach and the plan to manage and perform all activities required.</p> <p><u>DST8. Digital Services Response : PR Intake</u></p> <p>This Digital Services Response tasking consists of deliverables that will build upon the success of the PR Confirmation Portal and provide IRCC with further business benefits through digitizing the Permanent Resident Intake process. The development of a Minimal Viable Product (MVP1) for Digital Intake will include the "e-App" type functionality for the highest priority forms (identified below) that cut across all PR lines of business as foundational digitized information capture. There will still be PDF functionality available if clients are required to upload supporting documentation. In addition, the Integrated Contractor/IRCC team will identify one (agreed upon) full line of business to be digitized as a dynamic "e-App" for the end-to-end process (potentially with no PDF forms).</p> <p>The Contractor will leverage the Agile Delivery Methodology to conduct discovery, build the backlog of requirements/user stories and define the business benefits to be achieved through the development of MVP1. The Contractor will follow IRCC's Release Management process and work with IRCC to deploy the digital solution into production.</p> <p>The Integrated Contractor / IRCC team will digitize the PR intake process to achieve the following business outcome: Provide a digital intake service for PR clients to submit the application without the need to use paper, snail mail or in-person services. This will be done through the delivery of two key milestones: 1 silent pre-production release and 1 official release (MVP1).</p> <p>The PR Intake Solution will aim to deliver following business benefits based on the findings and sizing of stories during the Discovery phase:</p> <ul style="list-style-type: none"> Log in to portal – hosted in a protected B environment – using username / password Provide foundational information through a digitized form (including data from IMM-0008, IMM-008DE, IMM1344, Schedule A – Background/Declaration [IMM 5669], and IMM5406 – Additional Family Information) Upload completed forms and supporting documentation: for submission and get notified that the application has been submitted successfully View the status of the application (i.e. received, assigned to officer, returned, rejected, etc.), both from a case worker and a client perspective Receive notifications from IRCC to inform clients on the status of their application and potential actions required <p>The following PR Intake requirements have been identified as part of a preliminary assessment of the functionality to be delivered by the end of February 2021. Specific requirements, prioritization, and implementation approach will be confirmed as part of Discovery.</p>		

Degree of Confidence (H,M,L)	Generic Intake Requirements (all lines of business):
<ul style="list-style-type: none"> High High 	<ol style="list-style-type: none"> Secure login for client (username/password and ability to retrieve password) to be able to complete activities over multiple sessions Leverage Protected 8 portal work done by PR Confirmation team to accelerate process and adhere to consistent architecture and security requirements of the Government of Canada Ability to assess the family members as a unit (all information can be linked to the Principal Applicant) Ability to input data blocks through e-forms to auto populate: <ol style="list-style-type: none"> IMM-0008 IMM-008DEP IMM1344 Schedule A - Background/Declaration [IMM 5669] IMM5406 – Additional Family Information IMM5476 – Use of a Representative
<ul style="list-style-type: none"> High High High High High High 	<ol style="list-style-type: none"> Ability to link to the checklist/pdf forms for the identified PR line of business – clients to download PDF forms, complete, sign forms Ability for clients to upload completed forms and supporting documentation Ability for clients to receive notification that their application was submitted successfully Ability to directly request missing documents or information from the clients without the need to fully return the application Ability for IRCC to send new documents (i.e. approval letter, landing ceremony invitation, etc.) Ability to view status of applications (i.e. received, assigned to officer, returned, rejected, etc.) – from both a case worker and client perspective Ability to sort applications by various data points (name, UCI know/existing, etc. – as with PR portal) Ability to triage applications received by line of business chosen/submitted by the client for processing by IRCC Work with IRCC to enable the transfer of documents from the portal to IRCC's environment (i.e. cloud, GCDOCs, etc.) Ability for the portal to link with the PR confirmation portal Ability for the portal to meet Treasury Board Secretariat accessibility requirements Ability to return incomplete applications with reason for return
<ul style="list-style-type: none"> High – Data points TBC at Discovery High High High High High High Future MVP 	<ol style="list-style-type: none"> Input common data blocks through e-forms to auto-populate specific fields in PDFs forms
<ul style="list-style-type: none"> High: Line of Business TBC at Discovery 	<p>e-App:</p> <ol style="list-style-type: none"> End-to-end process for 1 PR Line of Business (To be confirmed) – without reverting to pdf forms

REVISED As of Amendment 6, in addition to the MVP1 release for Client Portal on March 30th, 2021, the contractor will deliver an MVP2 for supporting Case Worker portal by June 4th, and an MVP3 to digitize additional PDF forms by June 4th – IMM 5669, IMM 5406, IMM 5662, and IMM 0008 DEP for 5+ dependents.

DST9. Digital Intake - Analysis and Design (Option 1 requirements)

The Contractor will support IRCC by conducting detailed Analysis and Design of the priority requirements identified by the business. Building upon the success of the PR Intake and PR Confirmation Portal, the contractor will define the solution and business benefits to be delivered by continuing to digitize the Permanent Resident application process.

The Contractor will conduct detailed analysis of requirements as provided by IRCC in Option 1 for Representative access and Spousal class for PR Intake portal (list below). In 3 phases, the Contractor will assess requirements, define a realistic Minimum Viable Product (MVP4) for Representatives, design and provide validated estimates for an MVP4 release, with a target release date of late July 2021.

Objectives:

- Conduct detailed review of the PR backlog priorities to define the guardrails and realistic outcomes.
- Refine the backlog of selected user stories and align on high-level business benefits to be delivered by July.
- Design and confirm the functionality and business benefits to be developed for MVP4

Key Activities:

Phase 1: Frame (Week 1)

- Conduct 3 to 6 requirements gathering and analysis sessions with key stakeholders from IRCC's teams including Immigration Program Guidance, Comms, Legal and Infrastructure Support
- Map the current processes
- Draft high-level story map
- Define high-level technology and infrastructure needs

Phase 2: Define (Week 2)

- Host 2-3 working sessions with product owner to breakdown user stories and refine the backlog
- Define high-level MVP business benefits for Representatives
- Conduct preliminary, high-level solution design to assess viability of the solution by the end of July
- Define approach for technology and infrastructure improvements

- Estimate time and cost required to complete the MVP4 user stories and refine schedule and cost to deliver it

Phase 3: Design and Estimate (Weeks 3 and 4)

- Complete the development of overarching tech designs and solution architecture
- Develop design wireframes including copy and obtain necessary approvals
- Complete the detailed definition of the MVP4 scope and associated business benefits

Deliverables:

- High-level story map providing functional breakdown of requirements in Option 1
- Refined backlog of user stories including prioritization of features validated with IRCC, and acceptance criteria
- Approved wireframes and copy
- Schedule and cost for MVP4, which includes refined cost estimates with high confidence, list of uncertainties, assumptions and release schedule for MVP4

IRCC'S REQUIREMENTS - OPTION 1

- Ability for representatives to apply on behalf of their clients (PR Intake only)
 - Must allow clients to nominate representative (upload IMM5476 or digitized version of nomination of representative)
 - Must require representative to sign separately from the client
 - Must allow clients to revoke representative (upload IMM5476 or digitized version of nomination of representative)
 - Should include the ability to note where paid advice has been received from a consultant or lawyer who is not the representative
 - Must require the client to sign the application, not the representative.
 - Ability to sign application in a way that meets regulatory and other requirements (must include applicants, signature)
 - Must allow representative to upload all documents related to the client's application and submit application on behalf of client
 - Must allow clients to access a copy of the application submitted by the representative
 - Must allow representative to submit and receive correspondence (for tools that include correspondence) related to the client's application
 - Must allow clients to receive a copy of correspondence sent to the representative
 - Ability to link submitted applications to a rep-level account that manages all applications (like they can do with the current APR Portal)
 - For both paid and unpaid representatives, must allow capture of representatives':
 - Name
 - Contact address, including mailing address, telephone and email
 - Declaration that information provided is truthful and that they have read and understood it all
 - Consent to release information (as per regular IRCC applications)
 - Electronic signature
 - For paid reps only, must allow capture of:
 - Indication that the representative is paid
 - Name of representative's governing body
 - Representative's ID #
 - Firm name (where applicable)
 - For unpaid reps only, must allow capture of:
 - Indication that the representative is unpaid
 - Nature of relationship of representative to applicant (family member, etc.)
 - Must include wording that states clearly that "ghosting" and reps impersonating clients are forbidden
 - Must include the ability to report on all the above functionality.

- m. Ability to populate the system of record with rep-related information (right now this is done manually by IRCC staff and leads to errors, duplication, etc.)
- Ability for spousal applicants (Spouse or Common-Law Partner) to select which class they're applying under (Family class vs. Spouse or Common-Law Partner in Canada Class) – relevant functionality applicable to both Client and Case Worker portal.

DST10. Digital Intake - Support and Optimization

Production Support

The Contractor will continue providing IRCC with the required support and technical expertise to address critical incidents for the Permanent Residency Digital solution. A technical support model has already been implemented to manage incidents and support activities for the PR platform (including PR Intake and PR Confirmation) functionality, deployed into production and available to the public between November 2020 and May 2021. Service Level Agreement: Support will be available Monday-Friday between 8 am and 4 pm with a 4-hour response time for P1 critical incidents within support hours. The support model responsibilities will continue as previously, as described in Appendix A.

Optimization

The Contractor's objective is to support IRCC Digital Strategy Branch's growing capabilities around software development, new requirements and operations.

Outcomes:

- Maintained quality experience for clients and case workers in the production environment
- Ability to scale effectively for Option 1 requirements based on software development best practices and modern architecture principles

Key Activities:

- Address critical P1 incidents in the production environment
- Support in setting up remaining environments using infrastructure-as-code including a training (TRN) environment for case workers, a production emergency fix (PEF) environment, and a software testing environment (STE)
- Reduce the risk of software deployments through automation
- Prepare the PR Intake portal for the implementation of the upcoming features mentioned in Option 1 including improve scalability and flexibility of the system
- Implement a selection of other highly prioritized features determined between the product owner and the Contractor constrained by the timeframe of the amendment

Deliverables:

- Addressed known critical P1 incidents
- Three new AWS environments
- A selection of high priority features, determined between the IRCC Product Owner and the Contractor, and agreed to be achievable to build within the timeframe of this amendment

Risk Advisory Services

The Contractor must provide advisory services focused on assessing IRCC's existing remote workforce posture, considering the challenges created as a result of COVID-19 and its impact on IRCC's ability to execute its mandate. The output from the initial assessment of the remote workforce posture will inform a refresh of IRCC's cyber security strategy, initially created in 2019. Throughout this work, an emphasis will be placed on reinforcing, improving, and advancing IRCC's digital services and supporting any digital initiatives, in light of the increased cyber security activities in light of COVID-19.

This remote workforce assessment and the cyber security strategy refresh will be influenced by IRCC's working relationship with Canadian Centre for Cyber Security (CCCS) and SSC. Once areas of improvement related to

monitoring and/or network infrastructure have been identified, IRCC will need to work with CCCS or SSC to refresh the existing provided scope of services.

RAS1. Remote Workforce and Cyber Security Strategy Refresh

Key Activities:

- Conduct interviews with stakeholders and review documentation related to IRCC's remote workforce posture and existing digital transformation initiatives
- Provide an overview of environmental risks and threats in light of COVID-19
- Development of short- and medium-term recommendations, based on the focus on digital transformation initiatives and immediate remote workforce needs
- Draft updated cyber security strategy roadmap and work packages, highlighting key responsibilities by organization and changes that will directly impact digital transformation initiatives

Deliverables:

- Project plan, outlining the proposed approach for the remote workforce and cyber security strategy refresh
- Summary of the existing remote workforce posture, with the move to a more remote workforce
- Updated cyber security strategy roadmap and work packages, supported by overall recommendations / focus areas tied to digital initiatives and immediate remote workforce needs

REVISED

Technology Advisory Services

IRCC is currently on Oracle Siebel version IP2016 and in order to support digital services needs to investigate the implications and effort to migrate both of their Siebel applications, Grants and Contributions (GCS), and the Global Case Management System (GCMS), to Siebel 2021.xx*. This TA describes the key activities and end result (Deliverables) that will be conducted to complete a diagnostic assessment of work done to date to prepare for the upgrade and assess next steps. It is expected that the work to complete the Diagnostic Report will be conducted over a period of 3 weeks.

Key Activities:

- Upgrade:
 - Assess the documentation of the previous work towards a Siebel upgrade
 - Identify gaps between previously conducted assessment of then-current Siebel version and the new target version
 - Review IRCC's draft Siebel upgrade roadmap for both applications and identify potential gaps, risks, and dependencies
 - 2-3 discussions with the Siebel technical teams and 2-3 discussions with functional/business teams to answer questions about the provided documentation will be required
- Cloud
 - Review IRCC's previous documentation, approach and other materials prepared around a migration of each Siebel application to cloud
 - Conduct a gap analysis of the current work performed against a comprehensive cloud migration roadmap and make recommendations of next steps

Assumptions:

- IRCC will provide requested documentation prior to the start date

Deliverables:

- Diagnostic Report which would include:
 - Identified gaps, risks, and/or dependencies in IRCC's draft Siebel upgrade roadmap
 - Identified gaps, risks, and/or dependencies in IRCC's draft Siebel cloud migration roadmap

- Recommendations for next steps to prepare for the Siebel upgrade of both applications and cloud projects

Following the completion of the Diagnostic Report, we propose an alignment on the following future deliverables to support IRCC in finalizing the plans for the Siebel upgrade. The Technology Advisory Services Planning Deliverables, would include the following:

- Upgrade Assessment Refresh
- Updated Siebel upgrade roadmap
- Updated cloud migration roadmap
- Upgrade project charter

Change Management

The contractor will support the Transformation Change Management Office (TCMO) to develop a program level change management approach, function model (interaction model across the Transformation Programme, levers and CM hub), and a toolkit to deliver change.

CM1. Transformational Change Management Office Strategy & Implementation Plan

Outcomes:

- Consistent and adaptable approach to serve change management needs across the transformation programme
- Measurable and consistent approach to monitoring change (KPIs for readiness, adoption and change activities effectiveness)
-

Key Activities:

- Case for Change Canvas Session
- Develop components of change strategy
- Review existing OCM documentation for an understanding of current CM practices

Deliverables:

Change Management Strategy

- Proposed high-level approaches for the following:
 - Change Impact Assessing and Reporting
 - Communications and Stakeholder Engagement
 - Change Readiness Assessments and Reporting
 - Learning & Capability Needs Assessment
- TCMO Implementation Plan (launch plan)

CM2. Transformational Change Management Office Function Model

Outcomes:

- Objectives, goals and consistent messaging for the TCMO function
- Define partnership with CM hub
- Define working model with Transformation Programme – including levers

Key Activities:

- Interviews with key leaders to inform goals, mandate and objective of TCMO
- Workshop with levers to understand needs to inform service offering and interaction model Workshop with Transformation Programme to understand requirements and share initial thinking and proposed models
- Workshop with working group to review and discuss different interaction and service model options
- Design high-level TCMO roles and responsibilities supporting the interaction model

Deliverable:

- TCMO Function Design PowerPoint Document including:
 - TCMO objectives, mandate and goals
 - High Level structure including roles and responsibilities
 - TCMO interaction model with other levers
 - TCMO service offering delivery model (including Transformation Programme and partnership with CM Hub)

CM3. Transformational Change Management Office Toolkit

Outcomes:

- Future view of TCMO toolkit to deliver change management activities across the levers.

Key Activities:

- Assessment activity to review existing tools
- Share standard tools and templates to help drive standardization and adoption
- Workshop to present industry practices and approach of tools / templates shared

Deliverable:

- 3-4 CM tool templates
- Workshop output

As of Amendment 4, in addition, the contractor will support TCMO to implement their new service delivery model to serve the CM needs across the Digital Transformation Programme. The support will be focused in two work areas, co-delivery on the immediate CM needs on the Programme Roadmap, and for Deloitte to develop and deliver a CM Roadmap across the Programme initiatives.

CM4. Co-Delivery of CM Support to TCMO Clients

Outcomes:

- Capacity and capability to deliver / execute on CM needs for the programme
- Knowledge Transfer and Change delivery Capability building to TCMO team members

Key Activities:

- Leveraging the TCMO Service Delivery Model and Change Management Approach, to support TCMO in hitting the ground running early January in order to co-deliver on Change Management for Digital Journey Lab #3
- Support TCMO delivery of Key activities as part of the 'Define Success' phase within the Change Management approach for projects other than DJL Lab#3. Key activities as part of the 'Define Success' phase include:
 - Change Initiation Form and Lever Leadership Interview

- Initial Change Canvas Session
- Persona Assessment
- Leadership Alignment interviews
- Change Metrics Assessment
- Enterprise Change Management Branch Canvas Session
 - Conduct a Canvas session to support the ECMB to align on model and coalition vision

Deliverable:

- DJL Lab #3 Change Roadmap and execution during engagement duration.

CM5. Transformation Programme CM Roadmap

Outcomes:

- CM Initiation and CM Roadmap for the Transformation Programme Office
- Impacted stakeholders identified across the programme
- Preliminary view of changes / impacts across the Programme
- Integrated view of CM activities across the Transformation Programme

Key Activities:

- Development of CM Roadmap for each lever with a preliminary view of change activities across the lever initiatives (against Jan 2021 Digital Transformation Programme Roadmap).
- Partnering with Transformation Programme Office to develop metrics and capability building required to deliver on the digital strategy
- Development of CM Roadmap for the Transformation Programme Office

Deliverable:

- Transformation Programme CM Roadmap

Innovation and Experimentation

Key Activities

Conduct kick-off to align on objectives, stakeholder engagement and gather documentation related to current RPA capabilities and PoCs.

- Develop RPA Vision and Guiding Principles:
 - Conduct an RPA Workshop for the IRCC team to define the vision and guiding principles and discuss options for operations (e.g. enterprise vs corporate services approach). Include, at the IRCC's direction, stakeholders from other Branches across IRCC affected by the automation strategy
 - Based on workshop input, develop an artifact that outlines IRCC's vision for RPA and guiding principles
 - Define and validate RPA Program objectives
- Define Sustainment and Operating Model:
 - Define operating model type and structure (Centralized vs. Decentralized vs. Hybrid)
 - Define and document at a high-level the roles, responsibilities, skills and capabilities required to manage and operate each function within the operating model:

- Guidance on required strategic Advisory Functions
 - **Leadership Integration:** set the strategy and vision for Automation and act as the integration point between groups
 - **Automation Management:** plan and drive progress; ensure alignment to the vision; and report to leadership
- Guidance on required automation Delivery Functions
 - **Release and Integration Planning & Coordination:** Guidance on how to plan individual releases and engage stakeholders at the management level with consideration to existing release management processes at IRCC
 - **Change Management & Communications:** minimize workforce impacts and ensure workforce transition
 - **Automation Performance and Benefits Tracking:** define key performance measures, and track / report on benefit realization
 - **Process Intake:** select processes for automation that possess strong business value, and maintain pipeline for future releases
 - **Process Optimization:** execute process changes to optimize a process to enable automation or extend the scope of automation
 - **Automation Releases:** deliver the automated solution to production (which involves the design / build / testing & Review / deployment)
 - **Automation Support & Maintenance:** conduct incident management, managing robot capacity, and scheduling including IRCC integration points.
 - **Automation Operations:** support with day-to-day operations, including workload management and exception handling
- Develop Resource Plan:
 - Based on the operating model, identify staffing options for these roles (i.e., how will these roles be staffed - internal vs. contractor) for Year 1 of the RPA Program
- Develop RPA process for TR-PR PoC with production ready code
 - Configure and unit test solution according to requirements defined by IRCC
 - Conduct QA testing and validate solution functionality is Production ready

2. PERIOD OF SERVICES	FROM (DATE): August 18, 2020 TO (DATE): July 4, 2021
3. Work Location:	N/A – All work to be conducted remotely.
4. Invoice sent to:	FINInvoices-FacturesFIN.IRCC@cic.gc.ca [send copy of invoice to: carole.holden@tpsgc-pwgsc.gc.ca]
5. Travel Requirements:	N/A – All work to be conducted remotely.
6. Language Requirements:	English.
7. Other Conditions / Constraints:	N/A.
8. Level of Security Clearance Required for the Contractor Personnel:	Reliability Status.

9. Contractor's Response:

Please see beginning of response details on next page.

9.1 Milestone/Deliverable and Payment Schedule

s.20(1)(b)

Milestone/Deliverable	Delivery Week	Firm Price Amount
DST – Sprint 1 – Discovery & Backlog Development (DST1-DST4)	11-Sep-20	
RAS D1. Detailed Project Plan for Remote Workforce Security Review and Cyber Security Strategy and Roadmap Refresh	20-Nov-20	
RAS D2.1 Preliminary Summary of Remote Workforce Security Posture	11-Dec-20	
DST – Sprint 2 and 3 – Development (DST1-DST4)	9-Oct-20	
CM D1. Change Strategy	18-Dec-20	
RAS D2.2 Final Summary of Remote Workforce Security Posture	18-Dec-20	
RAS D3. Updated Cyber Security Strategy and Roadmap	12-Feb-21	
DST – Sprint 4 and 5 – Development (DST1-DST4)	6-Nov-20	
CM D2. Interaction Model	11-Dec-20	
CM D3. Change Toolkit	20-Nov-20	
CM – DJL Lab #3 Change Roadmap	5-Mar-21	
CM – Transformation Programme CM Roadmap	31-Mar-21	
DST – Sprint 6 and 7 – Development & Hypercare, User Research / Testing & Next Steps (DST1-DST4)	7-Dec-20	
DST – December – PR Intake Discovery, PR Confirmation Sprint 7 and mini-release, PR Support (0 P1 Critical Incidents Open) (DST6-DST8)	31-Dec-2020	
DST – January – PR Intake Sprint 1-2 and silent release, PR Confirmation Sprint 8-9, PR Support (0 P1 Critical Incidents Open) (DST6-DST8)	31-Jan-2021	
DST – April – Sprint 3-6 – PR Intake MVP2 development and testing, Release readiness, PR Support (0 P1 Critical Incidents Open) (DST6 – DST8)	04-Jun-2021	
DST – April – Sprint 7-8 - PR Intake MVP2 release and hypercare, PR Support (0 P1 Critical Incidents Open) (DST6-DST8)	04-Jun-2021	
Oracle Siebel Diagnostic Report	22-Jan-2021	

s.19(1)

s.20(1)(b)

Technology Advisory Services Planning Deliverables	12-Mar-2021*	
NEW RPA Vision and Guiding Principles	04-16-2021	
NEW RPA Sustainment and Operating Model	05-07-2021	
NEW RPA Resourcing Plan	05-14-2021	
NEW RPA Developer support	06-18-2021	
NEW DST: DST – May release – Sprint 8-10 PR Intake MVP3 development, release and hypercare, PR Support (0 P1 Critical Incidents Open) (DST6-DST8)	04-Jun-2021	
NEW DST9: Discovery and Design deliverables	4-Jul-2021	
NEW DST10: Digital Intake Support and Optimization	4-Jul-2021	
Total		\$5,048,500 \$5,224,260 \$5,414,260 \$5,499,260 \$5,927,260

* dates indicate tentatively planned dates requiring IRCC resource availability confirmation

Deliverable and Milestone Inspection and Acceptance: The Project Lead, on behalf of the Technical Authority, will inspect and accept the deliverables (as outlined in section 1) and milestones within 3 business days of submission from the Contractor, prior to payment processing.

9.2 Total Cost

Cost breakdown:

Deloitte understands that only Name, PWGSC Security File Number, and Date of Birth is required to be provided for future additional resources.

Please refer to Deloitte_TA7113302_B9220-210014-001_Resource_Update_2020-10-07.xlsx for details of resources added to this Task Authorization.

Category and Name of Proposed Resource	PWGSC Security File Number	Firm Per Diem Rate	Estimated # of Days	Total cost
- A.6 Programmer / Software Developer - Level 2				
- P.5 Project Executive - Level 3				
- P.5 Project Executive - Level 3				

s.19(1)

s.20(1)(b)

Level 3	- P.5 Project Executive -
Level 3	- P.5 Project Executive -
Level 3	- P.5 Project Executive -
Level 2	- B.3 Business Consultant -
Level 3	- P.5 Project Executive -
Consultant - Level 2	- B.3 Business
Consultant - Level 2	- B.3 Business
Level 3	- P.5 Project Executive -
3	P.5 Project Executive - Level 3
Consultant - Level 2	- B.3 Business
Level 2	- B.3 Business Consultant -
Level 2	- B.3 Business Consultant -
Level 3	- P.5 Project Executive -
Executive - Level 3	- P.5 Project
	- A.6
Programmer / Software Developer - Level 2	
Level 3	- B.3 Business Consultant -
Architect - Level 3	- I.11 Technology
3	P.5 Project Executive - Level 3
	P.8 Project Leader - Level 3
Level 3	- P.5 Project Executive -
Consultant - Level 3	B.3 Business
Software Architect - Level 3	A.1 Application
Level 3	- P.2 Enterprise Architect -
B.3 Business Consultant - Level 3	
(This position will be filled at a later date via a TA amendment)	
Level 2	- B.3 Business Consultant -
Level 2	- B.3 Business Consultant -
Consultant - Level 2	- B.3 Business
- Level 2	- B.3 Business Consultant
Developer - Level 1	A.6 Programmer / Software
Software Developer - Level 1	A.6 Programmer /
Consultant - Level 1	- B.3 Business
B.3 Business Consultant - Level 1	
(This position will be filled at a later date via a TA amendment)	

000060

	Applicable Taxes (B):	\$756,012.88 \$782,332.94 \$817,524.19 \$823,514.19 \$887,607.19
	Total Cost of TA (Taxes included) (C= A + B):	\$5,804,512.88 \$6,006,592.94 \$6,276,784.19 \$6,322,774.19 \$6,814,867.19

9.3 Key Contractor Assumptions and Dependencies

- Assumptions

- This work will be delivered at a firm fixed price as per the milestone / deliverable payment schedule above. The total fixed price is reflective of ~~\$5,927,260.00~~ ~~\$5,499,260.00~~ ~~\$5,459,260.00~~ ~~\$5,224,260.00~~ ~~\$5,048,500.00~~ sub-total of the TA and ~~\$887,607.19~~ ~~\$823,514.19~~ ~~\$817,524.19~~ ~~\$782,332.94~~ ~~\$756,012.86~~ in applicable taxes (based on a tax rate of 14.975%). This results in a total fixed price of ~~\$6,814,867.19~~ ~~\$6,322,774.19~~ ~~\$6,276,784.19~~ ~~\$6,006,592.94~~ ~~\$5,804,512.86~~.
- The cost breakdown provided is reflective of estimated effort and assumptions at the time of TA submission. Actual hours may vary from these estimates over the course of delivery, but will not impact the price to deliver the scope described in this fixed price TA
- The start date for this work will be the week of August 18, 2020
- The end date for this TA will be **July 4, 2021** to allow additional time for deliverable acceptance
- **Completion Date:** The work will be completed between August 18, 2020 and **June 25, 2021** and required IRCC stakeholders will be available to support this phase of work
- Activities and deliverables will be completed in collaboration with IRCC
- IRCC will identify the stakeholders to attend any information sessions and meetings
- Work will be conducted remotely via telephone and videoconferencing as appropriate
- For each of the workstreams, Deloitte and IRCC will confirm the deliverable sign-off process as part of the first week of work on this TA. This will include identifying who from IRCC will provide approval for each workstream / deliverable.
- Deliverables and work products (i.e., presentation material, tools and templates) will be provided in English. Translation, if required, will be provided, in a timely manner, by IRCC.
- Completion of the work within this TA will not preclude Deloitte from providing support to additional IRCC initiatives and priorities.
- Deloitte will not have access to live production data
- NEW: Deloitte offices will be closed between December 24 and January 4. Limited support will be available for P1 Critical support incidents via a process to be confirmed with IRCC
- NEW: The specific target release date of late July/early August will be confirmed upon completion of the analysis and design and in collaboration between the Contractor and IRCC, based on the estimated efforts and the functionality and design deemed essential for the MVP

Workstream 1 – Digital Transformation Services – Assumptions

- As part of Sprint 1 and Sprint 2 – Deloitte will work with IRCC to confirm the release schedule and approach. For each of sprints 3-6, Deloitte will produce production-ready MVP and functionality, and will work with IRCC to confirm when the functionality will be deployed to production

- Deloitte and IRCC will work together on Sprint Planning for Release 1. This includes the scope of each MVP after each sprint and the viability of a production-ready MVP to achieve a business objective
- IRCC will be responsible for facilitating any SA&A process steps and / or security authorities to operate
- IRCC will be responsible for defining and executing the deployment process for the production-ready code as per their standard procedures, governance, etc.
- IRCC will be responsible for identifying impacts of the MVP to current processes and providing training, communications, change management, job aids, etc. to users to facilitate the deployment and drive adoption of the service
- IRCC will be responsible for gathering any current state performance metrics related to current processing in order to facilitate any benefits tracking and reporting that may be required for the digital service
- The Deloitte support service hours are 8 am ET to 4pm ET, Monday to Friday with a 4-hr response time for P1 Critical incidents within support hours. Responses between December 24 – January 1 may be delayed. Deloitte will work with IRCC to confirm and align on support coverage requirements and expectations during this period
- NEW: The solutions developed as part of the Digital Transformation Services stream will be stand-alone and will not be integrated to existing IRCC systems (e.g. GCMS).
- NEW: As part of PR Intake MVP2 for Case Worker portal, functionality will include validation and generation of 2D barcodes from IMM 0008 to facilitate the uploading of information into GCMS. IRCC will be responsible for providing access to appropriate GCMS environments for development and testing. Alternatively, IRCC will provide access to IT and business users who can support the testing of 2D barcode generation and uploading into GCMS.
- NEW: Under Amendment 008, the Analysis and Design activities listed will be focused on defining and estimating MVP4 for Representative access. They will not include build activities for MVP4.
- NEW: The contractor will provide wireframes and copy files to enable IRCC to run user research sessions, as required.

- **Design Pod:**

- As it relates to the design / user-research stream:
 - Deloitte will...
 - ⊗ UPDATED: Be the process owner as it relates to all user research and validation
 - ⊗ UPDATED: Be the content owner on all user research protocols and processes
 - ⊗ UPDATED: Support stakeholder outreach, including development of engagement materials and/or communications (as it relates to any research with internal IRCC research participants)
 - Ensure consistent and meaningful knowledge sharing between Deloitte and IRCC
 - IRCC will...
 - NEW: conduct user research following standard practices in research
 - NEW: Be the content owner on all user research protocols and processes
 - Commit to devoting time and resources to supporting the project
 - Provide ready access to colleagues, expertise, and information connected to the user research
 - Own stakeholder interview logistics, planning and coordination as they relate to any internal stakeholders
 - Attend proposed meetings and provide feedback in a timely manner as it relates to research processes and protocols

○

▪ **Build & Technical Pod:**

- NEW: Deloitte will:
 - Own the sizing of user stories based on technical expertise and complexity associated to the desired functionality
 - Own the development and co-review testing of each story
 - Develop and manage a quality assurance strategy to enable IRCC to test system integration, security, legal, accessibility and overall functionality of the solution from the end-user viewpoint
 - Support IRCC to sign-off on Quality Assurance decisions and prioritization of bugs to be fixed within the agreed upon timeline
 - Ensure consistent and meaningful knowledge sharing between Deloitte and IRCC
 - Support IRCC in standing up the support model and manage the support activities for the solutions deployed to production
- IRCC will:
 - Provide a dedicated PO who has the ability to make decisions and will help liaise with those at IRCC required for meetings, sign-offs, etc.
 - PO to prioritize stories which should consider technical requirements
 - Provide confirmation on the technical architecture and infrastructure
 - Provide technical capabilities / resources to answer questions related to tech stack, platform, environments, etc. – this person does not need to be dedicated but does need to be able to provide significant time and will need to have an understanding of existing databases, integrations, existing APIs, etc. (although the web app is meant to be stand alone, there will be components that rely on existing data)
 - Provide the right decision makers / owners to determine requirements and solidify the MVP scope; scope should take into account technical requirements
 - Sign off on designs before they are developed – we cannot develop designs that do not have sign off; if changes are required post sign-off they will be added to the backlog and be prioritized by the PO
 - Confirm technical assumptions
 - Provide security requirements (e.g. audit logs given PII data, etc.) that should be part of the MVP; if security requirements are being omitted from the MVP, IRCC to provide sign-off on these decisions
 - Set-up dev and staging environments ahead of start date
 - Ensure development pipeline is set-up
 - Identify resource who will be responsible for deploying code to Production (Deloitte tech lead / developers can be on the phone, etc. but cannot actually submit the code for production)
 - Commit to devoting time and resources to discovery workshops and throughout the development sprints as additional clarification is required
 - Develop the go-live support documentation which includes the authority to operate documentation, Go/no-go decision criteria, release strategy and departmental approvals
 - Perform security testing, performance testing, agent training / communications / change management, public / media communications, etc. In support of go/no-go decision criteria (consistent with approach to PR Confirmation MVP1)

Workstream 2 – Risk Advisory Services – Assumptions

- IRCC will provide consent and coordinate introductions for Deloitte to discuss with other supplier Government of Canada departments (incl. ESDC, SSC, TBS, etc.) in support of this assessment

- Workstream 3 – Technical Advisory Services – Assumptions

- Deloitte will have access to the IRCC Siebel test environment to facilitate the review
- During this period, we expect to run 10 - 15 virtual workshops/sessions, ranging from 1 – 3 hrs, with stakeholders identified below to gather information, obtain clarifications and share findings
- Deloitte will produce an executive briefing deck (PPTX) based on the findings of the assessment
- Activities and deliverables will be completed in collaboration with IRCC.
 - Access to Siebel documentation for the current IRCC implementation
 - Access to the testing environment
 - Understanding of the Production environment Architecture Diagram and review of set-up will be required on week 1
 - Understanding of the current servers' licensing model will be required on week 1
 - Outcomes from this activity will provide an assessment of the current architecture and application configuration of the IRCC Siebel Implementation
 - A roadmap for future activities will be created outlining the timelines for the upgrade from IP2016 to Siebel 2019
- IRCC will identify the stakeholders to attend any information sessions and meetings.
 - At a minimum, the following resources will be available to attend sessions, meetings and address questions as they arise: IRCC technical team Technical architect, Siebel administrators, Siebel developer, Integration team, Database administrator, Tester, Release manager others to be identified as needed
- When working in agile, not all information is available early, the DJL Lab#3 Change Plan will be as detailed as per information available at the time of the engagement

Workstream 4 – Change Management Services – Assumptions

- IRCC will identify their internal requirements for OCM resourcing
- Subject Matter Experts will be available to attend meetings, working sessions and other activities per project plan
- Project Leadership will be available to aid in identifying key stakeholders
- IRCC will provide background documentation to Deloitte to assist with determining the current state
- Documentation and materials will be developed in English and all required translation of materials will be arranged by IRCC
- Conduct 5-7 stakeholder interviews for data gathering and alignment
- Facilitate 1-2 Change Canvas working sessions with IRCC stakeholders

- Workstream 5 – Innovation and Experimentation – Assumptions

- Our fixed fee is based on the estimated effort and informed by our understanding of IRCC's needs and the underlying assumptions in our proposed approach
- IRCC staff assigned to the Project will be able to represent IRCC's business and technical requirements and will be empowered to make decisions related to the scope of their role on the Project
- Developers will be granted access to all relevant environments to complete configuration by IRCC; delays to access may necessitate a revision of scope via a change request

- **Dependencies**

- Some team member names (as identified in the table above) are dependent on confirming the solution stack and timing of activities (during weeks 1 and 2). The cost table above is reflective of effort estimates and resource type.
- Digital Transformation Roadmap – the CM Roadmap will be based on initiatives identified on the current Transformation Roadmap
- Implementation of the TCMO Function model is dependent on its approval

10. Contractor's Signature

Name, Title and Signature of Individual Authorized to Sign on Behalf of **Contractor**

Shannon Kot

(type or print)

Signature: _____

Date: 6/17/2021

11. Approval – Signing Authority

Signatures (Client)

Name, Title and Signature of **Technical Authority** to Sign on Behalf of CIC

(type or print)

Signature: Violette Fehr, Nancy Digitally signed by Violette Fehr, Nancy
Date: 2021.06.18 10:19:45 -04'00'

Name, Title and Signature of **CIC Procurement Representative** to Sign on Behalf of CIC

(type or print)

Signature: Strangemore, Jessica Digitally signed by Strangemore, Jessica
Date: 2021.06.18 12:48:55 -04'00'

Signatures (PWGSC)

Name, Title and Signature of ***Contracting Authority** to Sign on Behalf of Public Works and Government Services Canada

(type or print)

Signature: Carole Holden Digitally signed by: Holden, Carole
Date: 2021.06.18 14:13:16 -04'00'
Date: _____

You are requested to sell to her Majesty the Queen in Right of Canada, in accordance with the terms and conditions set out herein, referred to herein, or attached hereto, the services listed herein and in any attached sheets at the price set out there of.

AMENDMENT NO: 9

APPENDIX B TO ANNEX A TASK AUTHORIZATION FORM

TASK AUTHORIZATION (TA) FORM			
Contractor:	DELOITTE INC.	Contract Number:	B9220-210014/001/ZM
Commitment Number (PR#):	153079	Financial Coding:	0500-0140-6762-54080-9220-9998
Task Number:	7113302 TA 01	Amendment Number:	009
Issue Date:		Response required by:	
1. STATEMENT OF WORK (WORK ACTIVITIES, CERTIFICATIONS AND DELIVERABLES)			
<p>NEW Amendment #009 is raised to:</p> <ul style="list-style-type: none"> Extend the end date of the TA No change to TA value <p>NEW Amendment #008 is raised to:</p> <ul style="list-style-type: none"> Extend Deloitte services for Digital Services Response workstream for Analysis and Design for next phase of work Extend Digital Services Support Model for live PR Digital products Increase the value of the TA by \$428,000 (exclusive of tax) in new Deliverable/Milestones for Digital Services Response workstream <p>NEW Amendment #007 is raised to:</p> <ul style="list-style-type: none"> Amend the Deliverable/Milestones dates for Workstream 5 – Innovation & Experimentation Increase the value of the TA by \$40,000 (exclusive of tax) for extended timeline for Deliverable/Milestone Correct milestone total from previous amendment <p>NEW Amendment #006 is raised to:</p> <ul style="list-style-type: none"> Amend the Deliverable/Milestones for Workstream 1 - Digital Service Response Increase the value of the TA by \$235,000 (exclusive of tax) for new Deliverable/Milestone <p>NEW Amendment #005 is raised to:</p> <ul style="list-style-type: none"> Amend the Description of the Project/Work required for the Innovation & Experimentation Workstream Revise deliverables and respective schedule for the Innovation & Experimentation Workstream No change to TA value <p>NEW Amendment #004 is raised to:</p> <ul style="list-style-type: none"> Extend Deloitte services to deliver Change Management support against the TA01 for the Transformation Change Management Office (TCMO) Increase the value of the TA by \$175,760.00 (exclusive of tax) in new Deliverable/Milestones for Workstream 4 – Change Management 			

NEW

Amendment #003 is raised to:

- Amend the Description of the Project/Work required (highlighted in yellow)
- Revise deliverables and their respective schedule

Amendment #002 was raised to:

- Amend the Description of the Project/Work required
- Extend the end date of the TA
- Increase the value of the TA by \$2,500,000.00 plus \$374,375.00 in applicable taxes for a total increase amount of \$2,874,375.00
- Add a Milestone/Deliverable and revise existing Milestones and their respective schedule.

Amendment 002 focuses on the Digital Services Response work stream and includes several work packages to achieve the overall objectives to satisfy Ministerial commitments for the PR file and continue to enable IRCC to respond to the ongoing pandemic pressures

Amendment #001 was raised to:

Revised Delivery Weeks for the following Work Streams

- Risk Advisory Services (RAS)
- Technology Advisory Services (TAS)
- Change Management (CM)
- Innovation and Experimentation (IE)

New and Revised content to Section 1. Statement of Work for the following areas:

- Change Management (CM)

Description of the Project / Work Required:

Digital Service Transformation- Emergency Response to COVID-19

Immigration, Refugees and Citizenship Canada (IRCC) is seeking the services of a global organization(s) (the "Contractor") with expertise in rapidly developing and implementing Digital solutions and supporting technologies in response to the recent global pandemic. COVID-19 has increased the urgency for IRCC to develop updated (i) new strategies, and (ii) processes and digital systems to cope with the rapid change it is undergoing. These include updating systems and processes for internal staff, re-thinking and re-designing how IRCC provides its services to its clients within Canada and around the world, leveraging digital processes wherever possible thus minimizing the need for in-person interaction or paper-based processes for the safety of IRCC's staff, clients and community.

The scope of this Task Authorization is to work with IRCC to support this Digital Services Response project through several complementary work streams. This includes the execution of critical activities in a timely and efficient manner by leveraging leading practices and advanced technologies.

This Task Authorization has five primary work streams to achieve the overall objectives for the CIO Organization:

- Digital Services Response
- Risk Advisory Services
- Technology Advisory Services
- Change Management
- Innovation and Experimentation

The focus of Amendment 02 is on the Digital Services Response work stream and includes the following work packages to achieve the overall objectives to satisfy Ministerial commitments for the PR file and continue to enable IRCC to respond to the ongoing pandemic pressures:

- Digital Services Support Model

- **Digital Services Response: PR Confirmation**
- **Digital Services Response: PR Intake**

Background

On March 11, 2020, the World Health Organization (WHO) declared the newly discovered Corona virus (COVID-19) as a global pandemic. With COVID-19, rapidly spreading and creating serious health threats across the globe, citizens, businesses, and governments are significantly disrupted creating an unprecedented economic impact.

The Government of Canada has taken unprecedented action in an effort to slow the spread of this virus. It has implemented significant international travel restrictions, significantly reduced in-person interactions with Government personnel, recalled citizens and staff from abroad and implemented strict guidelines for physical distancing and remote working. IRCC provides a critical array of services in support of temporary residents (temporary foreign workers, international students and visitors), permanent residents, citizenship seekers, refugees and asylum claimants and directly to Canadian citizens for passports and other travel documentation. Many of the above programs are currently supported by in-person or paper-based processes. Those processes that do include some automation are supported by aging IT systems that are not readily able to be adapted to support this new way of working or at the pace of change required to respond to the rapidly evolving response to the COVID-19 emergency... Success requires establishing a rapid capacity for change through immediate actions. Digital services strategies are required to facilitate a simplified, digitally enabled experience to improve productivity, while providing for new digital channels that will empower clients and applicants to carry out quicker processes easily, securely and conveniently.

TASKS

Digital Services Transformation

The Digital Services response objective is to support IRCC in reducing the backlog and pressures on Immigration Services. The Contractor and IRCC will work as an integrated team to create simple and easy digital solutions across the application process for all types of visa applications. This will be an agile process, starting with the highest priority for the Permanent Residency file. All deliverables in this section are based on the scope of the first Minimal Viable Product (MVP) which is the web-based release for Permanent Residency Intake.

This stream consists of the following 5 interdependent work packages as described below:

- DST1. Digital Intake Solution for Permanent Residency**
- DST2. Digital Architecture/Platform and Business Capability Model**
- DST3. Permanent Residency Release Roadmap**
- DST4. Agile Methodology and Governance**
- DST5. Proof Of Concept (POC) Chatbot**

DST1. Digital Intake Solution for Permanent Residency (responsive web service)

The Contractor must develop digital intake solutions that will provide the ability to accept IRCC clients for Permanent Resident applications. The Contractor will develop a series of Minimal Viable Products (MVPs) based on an Agile Methodology. Upon acceptance of an MVP, the Contractor will follow IRCC's Release Management process and work with IRCC to deploy the digital solution into production. The Contractor must provide the methodology, the approach and the plan to manage and perform all activities required.

Key Activities:

- Work an integrated team leveraging Agile Methodology and Delivery Approach with 2-week Sprints
- Creation of Project Plan and Backlogs
- Human Centered Design
- Creation of Production-Ready Digital Intake Solution as MVPs
- Integration with Cloud based Digital Platforms

Deliverables:

- Web Based Release for Permanent Residency Intake

DST2. Digital Architecture/Platform and Business Capability Model

Key Activities:

- Work with IRCC to deliver Technology Debt Reduction (TDR) outcomes
- Review IRCC Digital Platform Roadmap to reflect the impact of COVID-19
- Assess current TBS Digital Government policies in relation to IRCC services mandate
- Conduct Technology Options Analysis – Digital, Cloud, Disruptive and Emerging Technologies
- Work with IRCC, TBS and Shared Services Canada (SSC) on Enterprise Architecture Outcomes

Deliverables:

- Digital Architecture Strategy for Immigration Services
- Business Capability Modelling for Operations, IT/IM and Digital Services

DST3. Permanent Residency Release Roadmap

Key Activities:

- Review IRCC standard practices and release management
- Conduct interviews with senior leadership to evaluate potential release management approach
- Develop detailed multi-speed release management framework
- Conduct validation session, senior leadership across Digital, Operations and Programs, to refine the release management framework
- Build Release Roadmap for the Permanent Residency Digital Intake Solution and work plan defined as part of DST1.

Deliverables:

- Digital Solutions release framework and approach
- 12-month Permanent Residency Application release roadmap, beyond the MVP

DST4. Agile Methodology and Governance

Key Activities:

- Work with IRCC to build and prioritize backlog
- Discovery to perform user research, define features, build a high-level story map
- Scoping and analysis to define MVP of features, refine story map, design digital architecture, and confirm release and sprint plan.
- Delivery, including integration of test environments, design and build of functionality, testing functionality, conducting user testing and validation, and providing DevOps support.
- Release to production, conduct stakeholder review, facilitate feedback session, communicate to stakeholders

Deliverables:

- Delivering Agile Methodology & Governance approach to accelerate the Digital Service Transformation that

IRCC needs due to COVID-19

DST5. POC Chatbot

Key Activities:

- Work with IRCC to confirm the scope of the chatbot by identifying the top questions (i.e., intents and answers) that the chatbot should be able to answer
- Review the current platform and confirm technology viability and feasibility
- Work with IT and Communications to prepare for public launch of minimum viable chatbot
- Deploy into production, monitor and support

Deliverables:

- Develop minimum viable (text only) chatbot

Digital Services Response Workstreams

DST6. Digital Services Support Model

The Digital Services Support Model task's objective is for the Contractor to provide IRCC with the required support and technical expertise to deploy the Permanent Residency Digital solution into production and address critical incidents. A technical support model will be implemented to manage incidents and support activities for the PR platform (including PR Confirmation and PR Intake) functionality, deployed into production and available to the public between November 2020 and March 2021.

Service Level Agreement: Support will be available Monday-Friday between 8 and 4 pm with a 4-hour response time for P1 critical incidents within support hours.

The support model responsibilities are described in Appendix A.

DST7. Digital Services Response : PR Confirmation

The Digital Services Response objective is to support IRCC in reducing the ongoing backlog pressures on Immigration Services. The Contractor and IRCC will continue to work as an integrated team to create simple and easy digital solutions for the PR confirmation stages of the PR application process. This will be conducted in an agile process, starting with the highest priority for the Permanent Resident file.

This tasking consists of deliverables to support the continued development of the Digital Permanent Residency Solution. The integrated Contractor / IRCC team will develop 2 mini-releases for the PR Confirmation Portal to achieve the following business benefits:

- **Enhance security** of the portal including Multi-Factor Authentication (MFA) for case workers and the increase of IRCC security certificates.
- **Improve business process for case workers** through the implementation of additional features, for example, case-editing, additional statuses for cases, pagination, etc.
- **Improve client experience** through the implementation of functionality enhancements and features to better accommodate different user groups, for example, better explanation of next steps, improved accessibility compliance, etc.

The contractor will continue to leverage the Agile delivery methodology and approach, as established on TA7113302 to deliver this work. The current requirements identified as priorities by IRCC include:

Client	Case Worker	System (IT Priorities)
1. Indicate if not in Canada and see clear next steps	6. Create profiles for multiple clients (for head of family or reps to use)	14. Automatically delete case history
2. Notify client via email or text of		15. Integration with PR intake initiative (info will be useful for

updates to their case file (a prompt to check their profile) 3. Self-declare that photo is of client/confirming identity 4. Confirmation of case submission modal 5. Indicate how photo taken (professional digital photo, scanned photo or selfie)	7. Edit case details 8. Edit step status 9. Re-open profiles even after photo submitted for PR card production 10. Preview eCoPR 11. View self-declaration that photo is of client 12. View self-declaration that client is in Canada 13. View detail on how photo taken	PR confirmation and PR card) 16. Auto sign out due to inactivity 17. Multi-Factor Authentication (case worker) 18. Notify client via email of updates to their case file
--	--	---

As part of early planning activities, the Contractor's preliminary assessment establishes that:

- 11 of the 18 items are planned for Sprint 7 (beginning immediately)
- 6 of the 18 items are potential for Sprint 8 / 9
- 1 of the 18 items requires more analysis and decomposition with the business to accurately size and prioritize (e.g. Profile for Multiple) and is a potential for Sprint 8 / 9 / 10
- The allocation and prioritization for Sprint 8-10 will be confirmed with the business as part of sprint planning
- Sprint 8-10 are planned for reduced development capacity as emphasis shifts to Intake

Upon acceptance of another MVP, the Contractor will follow IRCC's Release Management process and work with IRCC to deploy the digital solution into production. The Contractor must provide the methodology, the approach and the plan to manage and perform all activities required.

DST8. Digital Services Response : PR Intake

This Digital Services Response tasking consists of deliverables that will build upon the success of the PR Confirmation Portal and provide IRCC with further business benefits through digitizing the Permanent Resident Intake process. The development of a Minimal Viable Product (MVP1) for Digital Intake will include the "e-App" type functionality for the highest priority forms (identified below) that cut across all PR lines of business as foundational digitized information capture. There will still be PDF functionality available if clients are required to upload supporting documentation. In addition, the Integrated Contractor/IRCC team will identify one (agreed upon) full line of business to be digitized as a dynamic "e-App" for the end-to-end process (potentially with no PDF forms).

The Contractor will leverage the Agile Delivery Methodology to conduct discovery, build the backlog of requirements/user stories and define the business benefits to be achieved through the development of MVP1. The Contractor will follow IRCC's Release Management process and work with IRCC to deploy the digital solution into production.

The Integrated Contractor / IRCC team will digitize the PR intake process to achieve the following business outcome: Provide a digital intake service for PR clients to submit the application without the need to use paper, snail mail or in-person services. This will be done through the delivery of two key milestones: 1 silent pre-production release and 1 official release (MVP1).

The PR Intake Solution will aim to deliver following business benefits based on the findings and sizing of stories during the Discovery phase:

- Log in to portal – hosted in a protected B environment – using username / password
- Provide foundational information through a digitized form (including data from IMM-0008, IMM-008DE, IMM1344, Schedule A – Background/Declaration [IMM 5669], and IMM5406 – Additional Family Information)
- Upload completed forms and supporting documentation: for submission and get notified that the application has been submitted successfully
- View the status of the application (i.e. received, assigned to officer, returned, rejected, etc.), both from a case worker and a client perspective
- Receive notifications from IRCC to inform clients on the status of their application and potential actions required

The following PR Intake requirements have been identified as part of a preliminary assessment of the functionality to be delivered by the end of February 2021. Specific requirements, prioritization, and implementation approach will be

- Define approach for technology and infrastructure improvements
- Estimate time and cost required to complete the MVP4 user stories and refine schedule and cost to deliver it

Phase 3: Design and Estimate (Weeks 3 and 4)

- Complete the development of overarching tech designs and solution architecture
- Develop design wireframes including copy and obtain necessary approvals
- Complete the detailed definition of the MVP4 scope and associated business benefits

Deliverables:

- High-level story map providing functional breakdown of requirements in Option 1
- Refined backlog of user stories including prioritization of features validated with IRCC, and acceptance criteria
- Approved wireframes and copy
- Schedule and cost for MVP4, which includes refined cost estimates with high confidence, list of uncertainties, assumptions and release schedule for MVP4

IRCC'S REQUIREMENTS - OPTION 1

- Ability for representatives to apply on behalf of their clients (PR Intake only)
 - Must allow clients to nominate representative (upload IMM5476 or digitized version of nomination of representative)
 - Must require representative to sign separately from the client
 - Must allow clients to revoke representative (upload IMM5476 or digitized version of nomination of representative)
 - Should include the ability to note where paid advice has been received from a consultant or lawyer who is not the representative
 - Must require the client to sign the application, not the representative.
 - Ability to sign application in a way that meets regulatory and other requirements (must include applicants, signature)
 - Must allow representative to upload all documents related to the client's application and submit application on behalf of client
 - Must allow clients to access a copy of the application submitted by the representative
 - Must allow representative to submit and receive correspondence (for tools that include correspondence) related to the client's application
 - Must allow clients to receive a copy of correspondence sent to the representative
 - Ability to link submitted applications to a rep-level account that manages all applications (like they can do with the current APR Portal)
 - For both paid and unpaid representatives, must allow capture of representatives':
 - Name
 - Contact address, including mailing address, telephone and email
 - Declaration that information provided is truthful and that they have read and understood it all
 - Consent to release information (as per regular IRCC applications)
 - Electronic signature
 - For paid reps only, must allow capture of:
 - Indication that the representative is paid
 - Name of representative's governing body
 - Representative's ID #
 - Firm name (where applicable)
 - For unpaid reps only, must allow capture of:
 - Indication that the representative is unpaid
 - Nature of relationship of representative to applicant (family member, etc.)

- k. Must include wording that states clearly that “ghosting” and reps impersonating clients are forbidden
- l. Must include the ability to report on all the above functionality.
- m. Ability to populate the system of record with rep-related information (right now this is done manually by IRCC staff and leads to errors, duplication, etc.)
- Ability for spousal applicants (Spouse or Common-Law Partner) to select which class they’re applying under (Family class vs. Spouse or Common-Law Partner in Canada Class) – relevant functionality applicable to both Client and Case Worker portal.

DST10. Digital Intake - Support and Optimization

Production Support

The Contractor will continue providing IRCC with the required support and technical expertise to address critical incidents for the Permanent Residency Digital solution. A technical support model has already been implemented to manage incidents and support activities for the PR platform (including PR Intake and PR Confirmation) functionality, deployed into production and available to the public between November 2020 and May 2021. Service Level Agreement: Support will be available Monday-Friday between 8 am and 4 pm with a 4-hour response time for P1 critical incidents within support hours. The support model responsibilities will continue as previously, as described in Appendix A.

Optimization

The Contractor's objective is to support IRCC Digital Strategy Branch's growing capabilities around software development, new requirements and operations.

Outcomes:

- Maintained quality experience for clients and case workers in the production environment
- Ability to scale effectively for Option 1 requirements based on software development best practices and modern architecture principles

Key Activities:

- Address critical P1 incidents in the production environment
- Support in setting up remaining environments using infrastructure-as-code including a training (TRN) environment for case workers, a production emergency fix (PEF) environment, and a software testing environment (STE)
- Reduce the risk of software deployments through automation
- Prepare the PR Intake portal for the implementation of the upcoming features mentioned in Option 1 including improve scalability and flexibility of the system
- Implement a selection of other highly prioritized features determined between the product owner and the Contractor constrained by the timeframe of the amendment

Deliverables:

- Addressed known critical P1 incidents
- Three new AWS environments
- A selection of high priority features, determined between the IRCC Product Owner and the Contractor, and agreed to be achievable to build within the timeframe of this amendment

Risk Advisory Services

The Contractor must provide advisory services focused on assessing IRCC's existing remote workforce posture, considering the challenges created as a result of COVID-19 and its impact on IRCC's ability to execute its mandate. The output from the initial assessment of the remote workforce posture will inform a refresh of IRCC's cyber security strategy, initially created in 2019. Throughout this work, an emphasis will be placed on reinforcing, improving, and advancing IRCC's digital services and supporting any digital initiatives, in light of the increased cyber security activities in light of COVID-19.

This remote workforce assessment and the cyber security strategy refresh will be influenced by IRCC's working relationship with Canadian Centre for Cyber Security (CCCS) and SSC. Once areas of improvement related to monitoring and/or network infrastructure have been identified, IRCC will need to work with CCCS or SSC to refresh the existing provided scope of services.

RAS1. Remote Workforce and Cyber Security Strategy Refresh

Key Activities:

- Conduct interviews with stakeholders and review documentation related to IRCC's remote workforce posture and existing digital transformation initiatives
- Provide an overview of environmental risks and threats in light of COVID-19
- Development of short- and medium-term recommendations, based on the focus on digital transformation initiatives and immediate remote workforce needs
- Draft updated cyber security strategy roadmap and work packages, highlighting key responsibilities by organization and changes that will directly impact digital transformation initiatives

Deliverables:

- Project plan, outlining the proposed approach for the remote workforce and cyber security strategy refresh
- Summary of the existing remote workforce posture, with the move to a more remote workforce
- Updated cyber security strategy roadmap and work packages, supported by overall recommendations / focus areas tied to digital initiatives and immediate remote workforce needs

REVISED

Technology Advisory Services

IRCC is currently on Oracle Siebel version IP2016 and in order to support digital services needs to investigate the implications and effort to migrate both of their Siebel applications, Grants and Contributions (GCS), and the Global Case Management System (GCMS), to Siebel 2021.xx*. This TA describes the key activities and end result (Deliverables) that will be conducted to complete a diagnostic assessment of work done to date to prepare for the upgrade and assess next steps. It is expected that the work to complete the Diagnostic Report will be conducted over a period of 3 weeks.

Key Activities:

- Upgrade:
 - Assess the documentation of the previous work towards a Siebel upgrade
 - Identify gaps between previously conducted assessment of then-current Siebel version and the new target version
 - Review IRCC's draft Siebel upgrade roadmap for both applications and identify potential gaps, risks, and dependencies
 - 2-3 discussions with the Siebel technical teams and 2-3 discussions with functional/business teams to answer questions about the provided documentation will be required
- Cloud
 - Review IRCC's previous documentation, approach and other materials prepared around a migration of each Siebel application to cloud
 - Conduct a gap analysis of the current work performed against a comprehensive cloud migration roadmap and make recommendations of next steps

Assumptions:

- IRCC will provide requested documentation prior to the start date

Deliverables:

- Diagnostic Report which would include:

- Identified gaps, risks, and/or dependencies in IRCC's draft Siebel upgrade roadmap
- Identified gaps, risks, and/or dependencies in IRCC's draft Siebel cloud migration roadmap
- Recommendations for next steps to prepare for the Siebel upgrade of both applications and cloud projects

Following the completion of the Diagnostic Report, we propose an alignment on the following future deliverables to support IRCC in finalizing the plans for the Siebel upgrade. The Technology Advisory Services Planning Deliverables, would include the following:

- Upgrade Assessment Refresh
- Updated Siebel upgrade roadmap
- Updated cloud migration roadmap
- Upgrade project charter

Change Management

The contractor will support the Transformation Change Management Office (TCMO) to develop a program level change management approach, function model (interaction model across the Transformation Programme, levers and CM hub), and a toolkit to deliver change.

CM1. Transformational Change Management Office Strategy & Implementation Plan

Outcomes:

- Consistent and adaptable approach to serve change management needs across the transformation programme
- Measurable and consistent approach to monitoring change (KPIs for readiness, adoption and change activities effectiveness)
-

Key Activities:

- Case for Change Canvas Session
- Develop components of change strategy
- Review existing OCM documentation for an understanding of current CM practices

Deliverables:

Change Management Strategy

- Proposed high-level approaches for the following:
 - Change Impact Assessing and Reporting
 - Communications and Stakeholder Engagement
 - Change Readiness Assessments and Reporting
 - Learning & Capability Needs Assessment
- TCMO Implementation Plan (launch plan)

CM2. Transformational Change Management Office Function Model

Outcomes:

- Objectives, goals and consistent messaging for the TCMO function
- Define partnership with CM hub

- Define working model with Transformation Programme – including levers

Key Activities:

- Interviews with key leaders to inform goals, mandate and objective of TCMO
- Workshop with levers to understand needs to inform service offering and interaction model Workshop with Transformation Programme to understand requirements and share initial thinking and proposed models
- Workshop with working group to review and discuss different interaction and service model options
- Design high-level TCMO roles and responsibilities supporting the interaction model

Deliverable:

- TCMO Function Design PowerPoint Document including:
 - TCMO objectives, mandate and goals
 - High Level structure including roles and responsibilities
 - TCMO interaction model with other levers
 - TCMO service offering delivery model (including Transformation Programme and partnership with CM Hub)

CM3. Transformational Change Management Office Toolkit

Outcomes:

- Future view of TCMO toolkit to deliver change management activities across the levers.

Key Activities:

- Assessment activity to review existing tools
- Share standard tools and templates to help drive standardization and adoption
- Workshop to present industry practices and approach of tools / templates shared

Deliverable:

- 3-4 CM tool templates
- Workshop output

As of Amendment 4, in addition, the contractor will support TCMO to implement their new service delivery model to serve the CM needs across the Digital Transformation Programme. The support will be focused in two work areas, co-delivery on the immediate CM needs on the Programme Roadmap, and for Deloitte to develop and deliver a CM Roadmap across the Programme initiatives.

CM4. Co-Delivery of CM Support to TCMO Clients

Outcomes:

- Capacity and capability to deliver / execute on CM needs for the programme
- Knowledge Transfer and Change delivery Capability building to TCMO team members

Key Activities:

- Leveraging the TCMO Service Delivery Model and Change Management Approach, to support TCMO in hitting the ground running early January in order to co-deliver on Change Management for Digital Journey Lab #3

- Support TCMO delivery of Key activities as part of the 'Define Success' phase within the Change Management approach for projects other than DJL Lab#3. Key activities as part of the 'Define Success' phase include:
 - Change Initiation Form and Lever Leadership Interview
 - Initial Change Canvas Session
 - Persona Assessment
 - Leadership Alignment interviews
 - Change Metrics Assessment
- Enterprise Change Management Branch Canvas Session
 - Conduct a Canvas session to support the ECMB to align on model and coalition vision

Deliverable:

- DJL Lab #3 Change Roadmap and execution during engagement duration.

CM5. Transformation Programme CM Roadmap

Outcomes:

- CM Initiation and CM Roadmap for the Transformation Programme Office
- Impacted stakeholders identified across the programme
- Preliminary view of changes / impacts across the Programme
- Integrated view of CM activities across the Transformation Programme

Key Activities:

- Development of CM Roadmap for each lever with a preliminary view of change activities across the lever initiatives (against Jan 2021 Digital Transformation Programme Roadmap).
- Partnering with Transformation Programme Office to develop metrics and capability building required to deliver on the digital strategy
- Development of CM Roadmap for the Transformation Programme Office

Deliverable:

- Transformation Programme CM Roadmap

Innovation and Experimentation

Key Activities

Conduct kick-off to align on objectives, stakeholder engagement and gather documentation related to current RPA capabilities and PoCs.

- Develop RPA Vision and Guiding Principles:
 - Conduct an RPA Workshop for the IRCC team to define the vision and guiding principles and discuss options for operations (e.g. enterprise vs corporate services approach). Include, at the IRCC's direction, stakeholders from other Branches across IRCC affected by the automation strategy
 - Based on workshop input, develop an artifact that outlines IRCC's vision for RPA and guiding principles
 - Define and validate RPA Program objectives

- Define Sustainment and Operating Model:
 - Define operating model type and structure (Centralized vs. Decentralized vs. Hybrid)
 - Define and document at a high-level the roles, responsibilities, skills and capabilities required to manage and operate each function within the operating model:
 - Guidance on required strategic Advisory Functions
 - **Leadership Integration:** set the strategy and vision for Automation and act as the integration point between groups
 - **Automation Management:** plan and drive progress; ensure alignment to the vision; and report to leadership
 - Guidance on required automation Delivery Functions
 - **Release and Integration Planning & Coordination:** Guidance on how to plan individual releases and engage stakeholders at the management level with consideration to existing release management processes at IRCC
 - **Change Management & Communications:** minimize workforce impacts and ensure workforce transition
 - **Automation Performance and Benefits Tracking:** define key performance measures, and track / report on benefit realization
 - **Process Intake:** select processes for automation that possess strong business value, and maintain pipeline for future releases
 - **Process Optimization:** execute process changes to optimize a process to enable automation or extend the scope of automation
 - **Automation Releases:** deliver the automated solution to production (which involves the design / build / testing & Review / deployment)
 - **Automation Support & Maintenance:** conduct incident management, managing robot capacity, and scheduling including IRCC integration points.
 - **Automation Operations:** support with day-to-day operations, including workload management and exception handling
- Develop Resource Plan:
 - Based on the operating model, identify staffing options for these roles (i.e., how will these roles be staffed - internal vs. contractor) for Year 1 of the RPA Program
- Develop RPA process for TR-PR PoC with production ready code
 - Configure and unit test solution according to requirements defined by IRCC
 - Conduct QA testing and validate solution functionality is Production ready

2. PERIOD OF SERVICES	FROM (DATE): August 18, 2020 TO (DATE): August 13, 2021
3. Work Location:	N/A – All work to be conducted remotely.
4. Invoice sent to:	FINInvoices-FacturesFIN.IRCC@cic.gc.ca [send copy of invoice to: carole.holden@tpsgc-pwgsc.gc.ca]
5. Travel Requirements:	N/A – All work to be conducted remotely.
6. Language Requirements:	English.
7. Other Conditions / Constraints:	N/A.
8. Level of Security Clearance Required for the Contractor Personnel:	Reliability Status.
9. Contractor's Response:	
Please see beginning of response details on next page.	

9.1 Milestone/Deliverable and Payment Schedule

Milestone/Deliverable	Delivery Week	Firm Price Amount
DST – Sprint 1 – Discovery & Backlog Development (DST1-DST4)	11-Sep-20	
RAS D1. Detailed Project Plan for Remote Workforce Security Review and Cyber Security Strategy and Roadmap Refresh	20-Nov-20	
RAS D2.1 Preliminary Summary of Remote Workforce Security Posture	11-Dec-20	
DST – Sprint 2 and 3 – Development (DST1-DST4)	9-Oct-20	
CM D1. Change Strategy	18-Dec-20	
RAS D2.2 Final Summary of Remote Workforce Security Posture	18-Dec-20	
RAS D3. Updated Cyber Security Strategy and Roadmap	12-Feb-21	
DST – Sprint 4 and 5 – Development (DST1-DST4)	6-Nov-20	
CM D2. Interaction Model	11-Dec-20	
CM D3. Change Toolkit	20-Nov-20	
CM – DJL Lab #3 Change Roadmap	5-Mar-21	
CM – Transformation Programme CM Roadmap	31-Mar-21	
DST – Sprint 6 and 7 – Development & Hypercare, User Research / Testing & Next Steps (DST1-DST4)	7-Dec-20	
DST – December – PR Intake Discovery, PR Confirmation Sprint 7 and mini-release, PR Support (0 P1 Critical Incidents Open) (DST6-DST8)	31-Dec-2020	
DST – January – PR Intake Sprint 1-2 and silent release, PR Confirmation Sprint 8-9, PR Support (0 P1 Critical Incidents Open) (DST6-DST8)	31-Jan-2021	
DST – April – Sprint 3-6 – PR Intake MVP2 development and testing, Release readiness, PR Support (0 P1 Critical Incidents Open) (DST6 – DST8)	04-Jun-2021	
DST – April – Sprint 7-8 - PR Intake MVP2 release and hypercare, PR	04-Jun-2021	

Support (0 P1 Critical Incidents Open) (DST6-DST8)			
Oracle Siebel Diagnostic Report	22-Jan-2021		
Technology Advisory Services Planning Deliverables	12-Mar-2021*		
NEW RPA Vision and Guiding Principles	04-16-2021		
NEW RPA Sustainment and Operating Model	05-07-2021		
NEW RPA Resourcing Plan	05-14-2021		
NEW RPA Developer support	06-18-2021		
NEW DST: DST – May release – Sprint 8-10 PR Intake MVP3 development, release and hypercare, PR Support (0 P1 Critical Incidents Open) (DST6-DST8)	04-Jun-2021		
NEW DST9: Discovery and Design deliverables	18-Jun-2021		
NEW DST10: Digital Intake Support and Optimization	18-Jun-2021		
Total			\$5,048,500 \$5,224,260 \$5,414,260 \$5,499,260 \$5,927,260

* dates indicate tentatively planned dates requiring IRCC resource availability confirmation

Deliverable and Milestone Inspection and Acceptance: The Project Lead, on behalf of the Technical Authority, will inspect and accept the deliverables (as outlined in section 1) and milestones within 3 business days of submission from the Contractor, prior to payment processing.

9.2 Total Cost

Cost breakdown:

Deloitte understands that only Name, PWGSC Security File Number, and Date of Birth is required to be provided for future additional resources.

Please refer to Deloitte_TA7113302_B9220-210014-001_Resource_Update_2020-10-07.xlsx for details of resources added to this Task Authorization.

s.19(1)

s.20(1)(b)

Category and Name of Proposed Resource	PWGSC Security File Number	Firm Per Diem Rate	Estimated # of Days	Total cost
- A.6 Programmer / Software Developer - Level 2				
- P.5 Project Executive - Level 3				
- P.5 Project Executive - Level 3				
P.5 Project Executive - Level 3				
- P.5 Project Executive - Level 3				
- P.5 Project Executive - Level 3				
- B.3 Business Consultant - Level 2				
- P.5 Project Executive - Level 3				
- B.3 Business Consultant - Level 2				
- B.3 Business Consultant - Level 2				
- P.5 Project Executive - Level 3				
- P.5 Project Executive - Level 3				
- B.3 Business Consultant - Level 2				
- B.3 Business Consultant - Level 2				
- P.5 Project Executive - Level 3				
- P.5 Project Executive - Level 3				
- A.6 Programmer / Software Developer - Level 2				
B.3 Business Consultant - Level 3				
I.11 Technology Architect - Level 3				
- P.5 Project Executive - Level 3				
P.8 Project Leader - Level 3				
P.5 Project Executive - Level 3				
B.3 Business Consultant - Level 3				
- A.1 Application Software Architect - Level 3				
- P.2 Enterprise Architect - Level 3				
B.3 Business Consultant - Level 3 (This position will be filled at a later date via a TA amendment)				
B.3 Business Consultant - Level 2				
- B.3 Business Consultant - Level 2				
- B.3 Business Consultant - Level 2				
- B.3 Business Consultant - Level 2				

000083

Adjustment to reflect fixed price milestones / deliverables for this TA (May 2021 – Amendment 6)		\$(1,890)
Adjustment to reflect fixed price milestones / deliverables for this TA (May 2021 – Amendment 7)		\$(1,000)
Adjustment to reflect fixed price milestones / deliverables for this TA (June 2021 – Amendment 8)		\$(970)
	Sub-Total of TA (Taxes Extra) (A):	\$5,048,500.00 \$5,224,260.00 \$5,459,260.00 \$5,499,260.00 \$5,927,260.00
	Applicable Taxes (B):	\$756,012.88 \$782,332.94 \$817,524.19 \$823,514.19 \$887,607.19
	Total Cost of TA (Taxes included) (C= A + B):	\$5,804,512.88 \$6,006,592.94 \$6,276,784.19 \$6,322,774.19 \$6,814,867.19

9.3 Key Contractor Assumptions and Dependencies

- Assumptions

- This work will be delivered at a firm fixed price as per the milestone / deliverable payment schedule above. The total fixed price is reflective of ~~\$5,927,260.00~~ ~~\$5,499,260.00~~ ~~\$5,459,260.00~~ ~~\$5,224,260.00~~ ~~\$5,048,500.00~~ sub-total of the TA and ~~\$887,607.19~~ ~~\$823,514.19~~ ~~\$817,524.19~~ ~~\$782,332.94~~ ~~\$756,012.86~~ in applicable taxes (based on a tax rate of 14.975%). This results in a total fixed price of ~~\$6,814,867.19~~ ~~\$6,322,774.19~~ ~~\$6,276,784.19~~ ~~\$6,006,592.94~~ ~~\$5,804,512.86~~.
- The cost breakdown provided is reflective of estimated effort and assumptions at the time of TA submission. Actual hours may vary from these estimates over the course of delivery, but will not impact the price to deliver the scope described in this fixed price TA
- The start date for this work will be the week of August 18, 2020
- The end date for this TA will be **August 13, 2021** to allow additional time for deliverable acceptance
- **Completion Date** The work will be completed between August 18, 2020 and **June 25, 2021** and required IRCC stakeholders will be available to support this phase of work
- Activities and deliverables will be completed in collaboration with IRCC
- IRCC will identify the stakeholders to attend any information sessions and meetings
- Work will be conducted remotely via telephone and videoconferencing as appropriate
- For each of the workstreams, Deloitte and IRCC will confirm the deliverable sign-off process as part of the first week of work on this TA. This will include identifying who from IRCC will provide approval for each workstream / deliverable.
- Deliverables and work products (i.e., presentation material, tools and templates) will be provided in English. Translation, if required, will be provided, in a timely manner, by IRCC.
- Completion of the work within this TA will not preclude Deloitte from providing support to additional IRCC initiatives and priorities.
- Deloitte will not have access to live production data
- **NEW:** Deloitte offices will be closed between December 24 and January 4. Limited support will be available for P1 Critical support incidents via a process to be confirmed with IRCC
- **NEW:** The specific target release date of late July/early August will be confirmed upon completion of the analysis and design and in collaboration between the Contractor and IRCC, based on the estimated efforts and the functionality and design deemed essential for the MVP

Workstream 1 – Digital Transformation Services – Assumptions

- As part of Sprint 1 and Sprint 2 – Deloitte will work with IRCC to confirm the release schedule and approach. For each of sprints 3-6, Deloitte will produce production-ready MVP and functionality, and will work with IRCC to confirm when the functionality will be deployed to production
- Deloitte and IRCC will work together on Sprint Planning for Release 1. This includes the scope of each MVP after each sprint and the viability of a production-ready MVP to achieve a business objective
- IRCC will be responsible for facilitating any SA&A process steps and / or security authorities to operate
- IRCC will be responsible for defining and executing the deployment process for the production-ready code as per their standard procedures, governance, etc.
- IRCC will be responsible for identifying impacts of the MVP to current processes and providing training, communications, change management, job aids, etc. to users to facilitate the deployment and drive adoption of the service
- IRCC will be responsible for gathering any current state performance metrics related to current processing in order to facilitate any benefits tracking and reporting that may be required for the digital service
- The Deloitte support service hours are 8 am ET to 4pm ET, Monday to Friday with a 4-hr response time for P1 Critical incidents within support hours. Responses between December 24 – January 1 may be delayed. Deloitte will work with IRCC to confirm and align on support coverage requirements and expectations during this period
- NEW: The solutions developed as part of the Digital Transformation Services stream will be stand-alone and will not be integrated to existing IRCC systems (e.g. GCMS).
- NEW: As part of PR Intake MVP2 for Case Worker portal, functionality will include validation and generation of 2D barcodes from IMM 0008 to facilitate the uploading of information into GCMS. IRCC will be responsible for providing access to appropriate GCMS environments for development and testing. Alternatively, IRCC will provide access to IT and business users who can support the testing of 2D barcode generation and uploading into GCMS.
- NEW: Under Amendment 008, the Analysis and Design activities listed will be focused on defining and estimating MVP4 for Representative access. They will not include build activities for MVP4.
- NEW: The contractor will provide wireframes and copy files to enable IRCC to run user research sessions, as required.

- Design Pod:

- As it relates to the design / user-research stream:
 - Deloitte will...
 - UPDATED: Be the process owner as it relates to all user research and validation
 - UPDATED: Be the content owner on all user research protocols and processes
 - UPDATED: Support stakeholder outreach, including development of engagement materials and/or communications (as it relates to any research with internal IRCC research participants)
 - Ensure consistent and meaningful knowledge sharing between Deloitte and IRCC
 - IRCC will...
 - NEW: conduct user research following standard practices in research

- **NEW: Be the content owner on all user research protocols and processes**
- Commit to devoting time and resources to supporting the project
- Provide ready access to colleagues, expertise, and information connected to the user research
- Own stakeholder interview logistics, planning and coordination as they relate to any internal stakeholders
- Attend proposed meetings and provide feedback in a timely manner as it relates to research processes and protocols
-

▪ **Build & Technical Pod:**

- **NEW: Deloitte will:**
 - Own the sizing of user stories based on technical expertise and complexity associated to the desired functionality
 - Own the development and co-review testing of each story
 - Develop and manage a quality assurance strategy to enable IRCC to test system integration, security, legal, accessibility and overall functionality of the solution from the end-user viewpoint
 - Support IRCC to sign-off on Quality Assurance decisions and prioritization of bugs to be fixed within the agreed upon timeline
 - Ensure consistent and meaningful knowledge sharing between Deloitte and IRCC
 - Support IRCC in standing up the support model and manage the support activities for the solutions deployed to production
- **IRCC will:**
 - Provide a dedicated PO who has the ability to make decisions and will help liaise with those at IRCC required for meetings, sign-offs, etc.
 - PO to prioritize stories which should consider technical requirements
 - Provide confirmation on the technical architecture and infrastructure
 - Provide technical capabilities / resources to answer questions related to tech stack, platform, environments, etc. – this person does not need to be dedicated but does need to be able to provide significant time and will need to have an understanding of existing databases, integrations, existing APIs, etc. (although the web app is meant to be stand alone, there will be components that rely on existing data)
 - Provide the right decision makers / owners to determine requirements and solidify the MVP scope; scope should take into account technical requirements
 - Sign off on designs before they are developed – we cannot develop designs that do not have sign off; if changes are required post sign-off they will be added to the backlog and be prioritized by the PO
 - Confirm technical assumptions
 - Provide security requirements (e.g. audit logs given PII data, etc.) that should be part of the MVP; if security requirements are being omitted from the MVP, IRCC to provide sign-off on these decisions
 - Set-up dev and staging environments ahead of start date
 - Ensure development pipeline is set-up
 - Identify resource who will be responsible for deploying code to Production (Deloitte tech lead / developers can be on the phone, etc. but cannot actually submit the code for production)
 - Commit to devoting time and resources to discovery workshops and throughout the development sprints as additional clarification is required

- Develop the go-live support documentation which includes the authority to operate documentation, Go/no-go decision criteria, release strategy and departmental approvals
- Perform security testing, performance testing, agent training / communications / change management, public / media communications, etc. In support of go/no-go decision criteria (consistent with approach to PR Confirmation MVP1)

Workstream 2 – Risk Advisory Services – Assumptions

- IRCC will provide consent and coordinate introductions for Deloitte to discuss with other supplier Government of Canada departments (incl. ESDC, SSC, TBS, etc.) in support of this assessment

- Workstream 3 – Technical Advisory Services – Assumptions

- Deloitte will have access to the IRCC Siebel test environment to facilitate the review
- During this period, we expect to run 10 - 15 virtual workshops/sessions, ranging from 1 – 3 hrs, with stakeholders identified below to gather information, obtain clarifications and share findings
- Deloitte will produce an executive briefing deck (PPTX) based on the findings of the assessment
- Activities and deliverables will be completed in collaboration with IRCC.
 - Access to Siebel documentation for the current IRCC implementation
 - Access to the testing environment
 - Understanding of the Production environment Architecture Diagram and review of set-up will be required on week 1
 - Understanding of the current servers' licensing model will be required on week 1
 - Outcomes from this activity will provide an assessment of the current architecture and application configuration of the IRCC Siebel Implementation
 - A roadmap for future activities will be created outlining the timelines for the upgrade from IP2016 to Siebel 2019
- IRCC will identify the stakeholders to attend any information sessions and meetings.
 - At a minimum, the following resources will be available to attend sessions, meetings and address questions as they arise: IRCC technical team Technical architect, Siebel administrators, Siebel developer, Integration team, Database administrator, Tester, Release manager others to be identified as needed
- When working in agile, not all information is available early, the DJL Lab#3 Change Plan will be as detailed as per information available at the time of the engagement

Workstream 4 – Change Management Services – Assumptions

- IRCC will identify their internal requirements for OCM resourcing
- Subject Matter Experts will be available to attend meetings, working sessions and other activities per project plan
- Project Leadership will be available to aid in identifying key stakeholders
- IRCC will provide background documentation to Deloitte to assist with determining the current state
- Documentation and materials will be developed in English and all required translation of materials will be arranged by IRCC
- Conduct 5-7 stakeholder interviews for data gathering and alignment
- Facilitate 1-2 Change Canvas working sessions with IRCC stakeholders

- Workstream 5 – Innovation and Experimentation – Assumptions

- Our fixed fee is based on the estimated effort and informed by our understanding of IRCC's needs and the underlying assumptions in our proposed approach
- IRCC staff assigned to the Project will be able to represent IRCC's business and technical requirements and will be empowered to make decisions related to the scope of their role on the Project
- Developers will be granted access to all relevant environments to complete configuration by IRCC; delays to access may necessitate a revision of scope via a change request

- **Dependencies**

- Some team member names (as identified in the table above) are dependent on confirming the solution stack and timing of activities (during weeks 1 and 2). The cost table above is reflective of effort estimates and resource type.
- Digital Transformation Roadmap – the CM Roadmap will be based on initiatives identified on the current Transformation Roadmap
- Implementation of the TCMO Function model is dependent on its approval

10. Contractor's Signature	
Name, Title and Signature of Individual Authorized to Sign on Behalf of Contractor (type or print) Shannon Kot	Signature: _____ Date: <u>6/30/2021</u>
11. Approval – Signing Authority	
Signatures (Client)	
Name, Title and Signature of Technical Authority to Sign on Behalf of CIC (type or print)	<div style="display: flex; justify-content: space-between;"> <div> Subhani, Omar </div> <div style="font-size: small;"> Digitally signed by Subhani, Omar Date: 2021.06.30 13:52:51 -04'00' </div> </div> Signature: _____ Date: _____
Name, Title and Signature of CIC Procurement Representative to Sign on Behalf of CIC (type or print)	<div style="display: flex; justify-content: space-between;"> <div> Thomas, Jodie </div> <div style="font-size: small;"> Digitally signed by Thomas, Jodie Date: 2021.06.30 13:58:41 -04'00' </div> </div> Signature: _____ Date: _____
Signatures (PWGSC)	
Name, Title and Signature of *Contracting Authority to Sign on Behalf of Public Works and Government Services Canada (type or print)	<div style="display: flex; justify-content: space-between;"> <div> <i>Carole Holden</i> </div> <div style="font-size: small;"> Digitally signed by: Holden, Carole Date: 2021.06.30 14:39:57 -04'00' </div> </div> Signature: _____ Date: _____

You are requested to sell to her Majesty the Queen in Right of Canada, in accordance with the terms and conditions set out herein, referred to herein, or attached hereto, the services listed herein and in any attached sheets at the price set out there of.

APPENDIX B TO ANNEX A TASK AUTHORIZATION FORM

TASK AUTHORIZATION (TA) FORM			
Contractor:	DELOITTE INC.	Contract Number:	B9220-210014/001/ZM
Commitment Number (PR#):		Financial Coding:	0500-0140-6762-54080-9220-9998
Task Number:	7113302	Amendment Number:	
Issue Date:		Response required by:	
1. STATEMENT OF WORK (WORK ACTIVITIES, CERTIFICATIONS AND DELIVERABLES)			
<p>The work described here is an extension of Deloitte services to deliver Change Management support against the TA01 for the Transformation Change Management Office (TCMO). Details of the original scope delivered October 2020 to December 2020, can be found in the TA01-WS4 and is omitted in detail below for ease of reading.</p> <p>Legend:</p> <ul style="list-style-type: none"> Work delivered October 2020 to December 2020 (detailed on previous TA01) <u>Work detailed here and to be delivered January 2021 to March 2021</u> <p>Collectively to date, the Change Management scope includes:</p> <ul style="list-style-type: none"> CM1. Transformational Change Management Office Strategy & Implementation Plan CM2. Transformational Change Management Office Function Model CM3. Transformational Change Management Office Toolkit CM4. Co-Delivery of CM Support to TCMO Clients CM5. Transformation Programme CM Roadmap <p>Change Management</p> <p>The contractor will support TCMO to implement their new service delivery model to serve the CM needs across the Digital Transformation Programme. The support will be focused in two work areas, co-delivery on the immediate CM needs on the Programme Roadmap, and for Deloitte to develop and deliver a CM Roadmap across the Programme initiatives.</p> <p>CM4. Co-Delivery of CM Support to TCMO Clients</p> <p><u>Outcomes:</u></p> <ul style="list-style-type: none"> Capacity and capability to deliver / execute on CM needs for the programme Knowledge Transfer and Change delivery Capability building to TCMO team members <p><u>Key Activities:</u></p> <ol style="list-style-type: none"> a. Leveraging the TCMO Service Delivery Model and Change Management Approach, to support TCMO in hitting the ground running early January in order to co-deliver on Change Management for DJL Lab #3 b. Support TCMO delivery of Key activities as part of the 'Define Success' phase within the Change Management approach for projects other than DJL Lab#3. Key activities as part of the 'Define Success' phase include: <ol style="list-style-type: none"> 1. Change Initiation Form and Lever Leadership Interview 2. Initial Change Canvas Session 3. Leadership Alignment interviews 4. Change Metrics Assessment <p><u>Deliverable:</u></p> <ul style="list-style-type: none"> DJL Lab #3 Change Roadmap and execution during engagement duration. 			

CM5. Transformation Programme CM Roadmap

s.20(1)(b)

Outcomes:

- CM Initiation and CM Roadmap for the Transformation Programme Office
- Impacted stakeholders identified across the programme
- Preliminary view of changes / impacts across the Programme
- Integrated view of CM activities across the Transformation Programme

Key Activities:

- Development of CM Roadmap for each lever with a preliminary view of change activities across the lever initiatives (against Jan 2021 Digital Transformation Programme Roadmap).
- Partnering with Transformation Programme Office to develop metrics and capability building required to deliver on the digital strategy
- Development of CM Roadmap for the Transformation Programme Office

Deliverable:

- Transformation Programme CM Roadmap

2. PERIOD OF SERVICES	FROM (DATE):	TO (DATE):
3. Work Location:	N/A – All work to be conducted remotely.	
4. Invoice sent to:	IRCC.DSBFINANCEADMIN-DGSNFINANCEADMIN.IRCC@cic.gc.ca [send copy of invoice to: carole.holden@tpsgc-pwgsc.gc.ca]	
5. Travel Requirements:	N/A – All work to be conducted remotely.	
6. Language Requirements:	English.	
7. Other Conditions / Constraints:	N/A.	
8. Level of Security Clearance Required for the Contractor Personnel:	Reliability Status.	

9. Contractor's Response:

9.1 Milestone/Deliverable and Payment Schedule

Milestone/Deliverable	Delivery Week	Firm Price Amount
DJL Lab #3 Change Roadmap	March 31 2021	
Transformation Programme CM Roadmap	March 31 2021	

Deliverable and Milestone Inspection and Acceptance: The Project Lead, on behalf of the Technical Authority, will inspect and accept the deliverables (as outlined in section 1) and milestones within 3 business days of submission from the Contractor, prior to payment processing.

9.2 Total Cost

Cost breakdown:

9.3 Key Contractor Assumptions and Dependencies

- **Assumptions**
 - When working in agile, not all information is available early, the DJL Lab#3 Change Plan will be as detailed as per information available at the time of the engagement
- **Dependencies**
 - Digital Transformation Roadmap – the CM Roadmap will be based on initiatives identified on the current Transformation Roadmap
 - Implementation of the TCMO Function model is dependent on it's approval (socialization is currently underway)

Name, Title and Signature of Individual Authorized to Sign on Behalf of **Contractor**

Date: _____

Signatures (Client)

Date: _____

Date: _____

Date: _____

You are requested to sell to her Majesty the Queen in Right of Canada, in accordance with the terms and conditions set out herein, referred to herein, or attached hereto, the services listed herein and in any attached sheets at the price set out there of.



Purchase Requisition for Goods and Services - Demande d'achat de biens et de services

Immigration, Refugees and Citizenship Canada **Immigration, Réfugiés et Citoyenneté Canada**
biens et de services
 Information disclosed under the Access to Information Act
 L'information divulguée en vertu de la loi sur l'accès à l'information

To: / À:	Destination	Invoices - Original and two copies are to be made out and sent to Factures - Remplir et envoyer l'original et deux copies à	Originator - Auteur	Telephone No. - N° de téléphone
			FELIX GOYETTE	438-892-0776
			Address Technical Inquiries To : Demande d'information techniques à :	Telephone No. N° de téléphone
			FELIX GOYETTE	438-892-0776

Item Article	Reference/Stock Number and Description Numéro de référence de nomenclature et description	Date Required Demandé pour le D/J M Y/A	Consignee Code Code du destinataire	U. of I. U. de D.	Quantity Quantité	Estimated Cost Prix estimatif	Previous Quantity and Unit Price Quantité et prix unitaire précédents	Previous Contract No. and Date Date et n° du contrat précédent
00001	DJL Lab 3 Change Roadmap DJL Lab #3 Change Roadmap	31 03 21		EA				
00002	Transformation Programme CM Roadmap Transformation Programme CM Roadmap	31 03 21		EA				
	=====							
	The currency of this P.R. is - La devise de cette demande est : CAD							
	=====							
	Financial Codes Codage financier 0500-0140-6762-54080-9135-9998	Amount Montant 175,000.00						

Special Instructions - Instructions spéciales

Pursuant to sub section 32(1) of the Financial Administration Act, funds are available. En vertu du paragraphe 32(1) de la Loi sur la gestion des finances publiques, des fonds sont disponibles.

Kunsken, Derek

Digitally signed by Kunsken, Derek
Date: 2021.02.12 08:19:06 -05'00'

Signature _____

Date _____

D. Kunsken

Signee's Name - Nom du signataire

S.20/11/61
000094

Canada

Suggested Vendor:
Deloitte & Touche LLP
1600-100 QUEEN ST
OTTAWA, ON
K1P 5T8

Page 95

**is withheld pursuant to section
est retenue en vertu de l'article**

20(1)(b)

**of the Access to Information Act
de la Loi sur l'accès à l'information**

Page 96

**is withheld pursuant to section
est retenue en vertu de l'article**

20(1)(b)

**of the Access to Information Act
de la Loi sur l'accès à l'information**

Page 97

**is withheld pursuant to section
est retenue en vertu de l'article**

20(1)(b)

**of the Access to Information Act
de la Loi sur l'accès à l'information**



FORMULAIRE DE DEMANDE DE PAIEMENT (Attestation selon l'article 34 de la LGFP)

Joindre ce formulaire à la facture/réclamation et s'assurer que les documents de support comportent des preuves de vérification claires décrites à la section 5.3 de la Procédure relative au pouvoir d'attestation (article 34 de la LGFP).

PARTIE A - VÉRIFICATION DES COMPTES					
Numéro fournisseur	Nom du fournisseur	Numéro de facture/réclamation	Préparé par	Date de la facture	Date de réception de la facture
1001729	Deloitte & Touche LLP	8001727999	Félix GOyette	2021-04-07	2021-04-07

GL	Description GL (population automatique avec le code de GL)	Allocation %	Montant \$	CC	OI	Élément d'OTP	Fond	Engagement ou Numéro BC	Ligne	N° d'entrée de marchandises
54080	Consultants en TI et en télécommunications	100	115 760,00\$	91356762	9998		0140	7113302	150	5000373461
A%	Pour diviser une allocation de dépense, appuyé sur A% et inscrire le montant payable avant taxes au fournisseur (Allocation doit égaler 100% du montant).			Commentaires Contract Number: B9220-210014/001/ZM •CM -Transformation Programme CM Roadmap						
13501	TPS sur les achats	TPS/TVH	5 788,00\$							
13503	TVQ sur les achats	TVQ	11 547,06\$							
Montant payable au fournisseur			133 095,06\$							

PARTIE B - RESPONSABILITÉS SELON LA DÉLÉGATION DE POUVOIR DE L'ARTICLE 34 DE LA LGFP (GCR)

Selon la délégation de pouvoir de l'article 34 de la LGFP, je confirme et certifie que le paiement est exact et conforme aux exigences suivantes :

- | | |
|--|---|
| <input checked="" type="checkbox"/> les services ont été rendus, les fournitures ont été livrées ou les travaux ont été exécutés selon les termes et conditions d'une entente ou d'un contrat; | <input checked="" type="checkbox"/> le bénéficiaire a droit ou est admissible au paiement; |
| <input checked="" type="checkbox"/> tous les règlements, lois, décrets et politiques/directives du Conseil du Trésor pertinents ont été respectés (ex.: paiements anticipés); | <input checked="" type="checkbox"/> la documentation fondée sur des preuves tangibles est exacte et complète et contient toutes les pièces jointes nécessaires; |
| <input checked="" type="checkbox"/> la transaction est exacte et complète. (nom, adresse, montant, quantités, taxes, aucun frais inadmissible et remises déduites); | <input checked="" type="checkbox"/> la transaction comporte un codage financier approprié conforme au manuel de codage; et |
| | <input checked="" type="checkbox"/> le montant demandé n'a pas encore été payé. |

Centre financier	Montant	Nom (caractère imprimé)	Signature/Date
9135	115 760,00\$	Derek Kunsken	Kunsken, Derek <small>Digitally signed by Kunsken, Derek Date: 2021.04.07 14:41:46 +04'00'</small>
115 760,00\$		Le montant total approuvé pour le paiement doit correspondre au montant total avant taxes ci-haut.	

Partie C - RÉVISION ET RECOMMANDATION

Commentaires	Signature/Date

SauvegarderRéinitialiserImprimer

Partie D - VÉRIFICATION APRÈS PAIEMENT (POUR LES FINANCES SEULEMENT)	
Commentaires	Signature/Date

IRCC | Transformation Programme Change Management Roadmap

Managed Change Throughout the Transformation Roadmap

Q4 2021



Introduction | How to read this document

Objectives of the Change Roadmap

- Showcases the Transformation Change Management support on different Transformation Programme initiatives by providing a holistic and integrated view of change activities.
- Evergreen document that will evolve overtime and in alignment with updates to Transformation Programme Roadmap

How to Read this Document

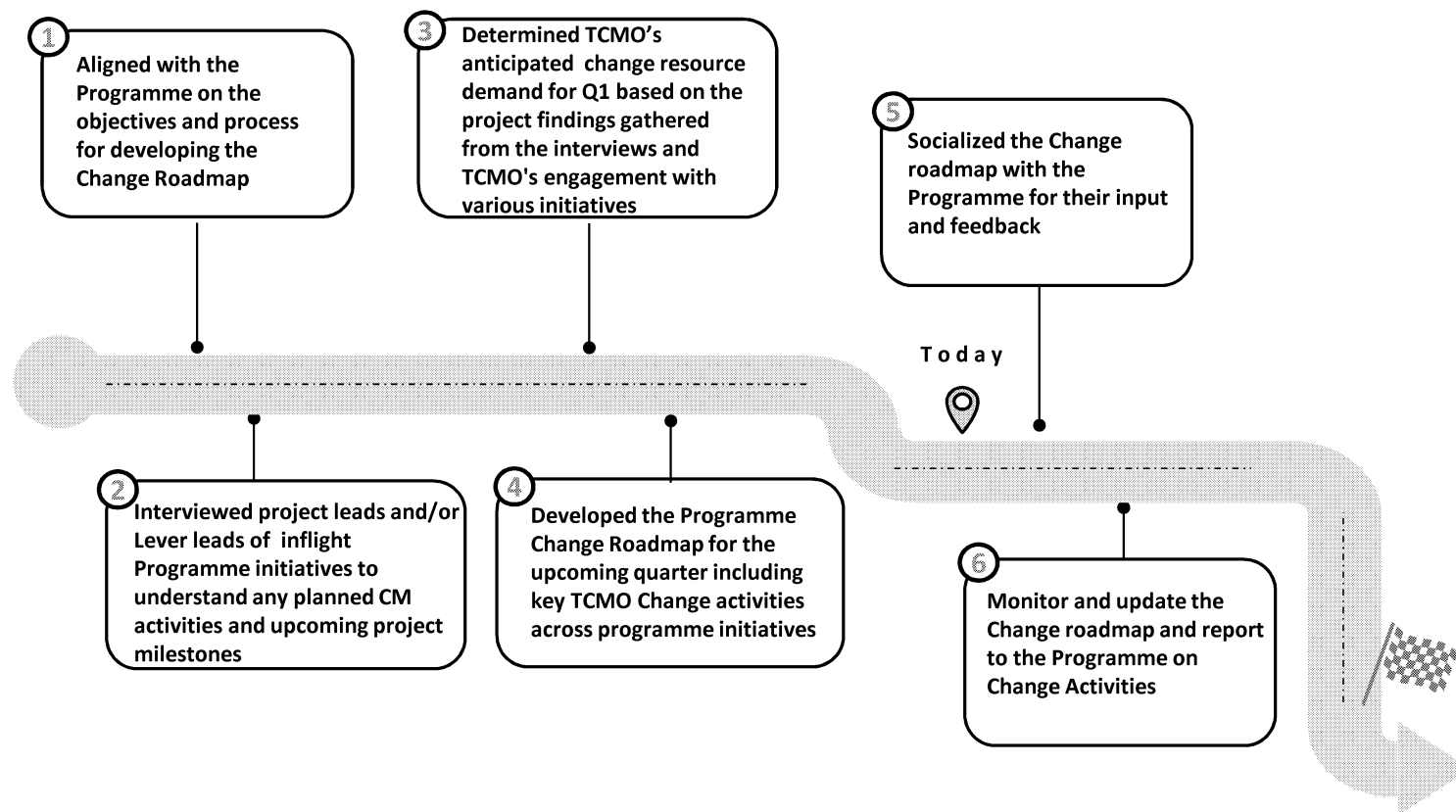
- The Transformation Change Roadmap activities are highlighted and aligned with project key milestones across the different areas of focus such as:
- **Our people** by enabling the Programme workforce
 - **Digital Services and Tools** with the different digital Journeys Labs
 - **Stabilize platform** with the Technical Debt Reduction (TDR) and the Cloud Enablement
 - **Programme mobilization** by strengthening the Programme foundation
- In collaboration with the Programme, TCMO will update the Change Roadmap on a quarterly basis.

Contents

1. Introduction
2. TCMO's Approach
3. Executive Summary
4. Transformation Programme Change Risks & Mitigations
5. Transformation Programme Change Roadmap
6. Next Steps
7. Appendix A -Change Assessment by Initiative
8. Appendix B – Transformation Programme Roadmap

TCMO's Approach

Below is an overview of the process taken to assess the Transformation Programme Roadmap initiatives and understand change management needs and plans across the programme

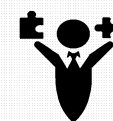


Change Roadmap Outcomes



Level of CM saturation across the Transformation Programme

Better understanding of the level of change management saturation across the Transformation Programme, and potential change risks



Programme view of Change Management plan delivery

Enables a view of inflight change management activities across the Transformation Programme



Change Resource Demands and Capacity

Develop an understanding of anticipated TCMO resource demands over the next quarter

Executive Summary

Based on the outcomes of our interviews with the various Programme Roadmap initiatives the following emerging themes, potential impacts and change considerations have been identified

Who We Engaged

To better understand **inflight change management activities** and **upcoming** plans for the next quarter, the TCMO interviewed **Project Leads, Levers Leads, and/or Change Leads** of initiatives aligned to the Transformation Programme Roadmap, including:

- | | | | |
|----------------------|-----------------------|---------------------------|----------------------------|
| • RPA – AITP | • DJL #1 : TR Officer | • Digital Talent Strategy | • DJL#2: Citizenship Grant |
| • DJL# 4: My Account | • DJL #1: TR Client | • DPM Change Lead | • Citizen Status Tracker |
| • ILT – Kaizen MTL | • DJL #3: PR Spousal | • PR Digital Intake | |

Emerging Themes

Based on the interviews, below are the major themes identified:

- 1. Improve awareness of the TCMO:** Opportunity exists for further socialization of the TCMO, its service delivery approach and a client journey (e.g., share client engagement material, etc.)
- 2. Inconsistent structure of Change Teams:** Change teams are varied in their structure across the programme, for example some initiatives have embedded change teams, some lack identified CM support, and others require support from the TCMO
- 3. Increasing demand for Change Management support:** Ramping up of transformation activities over the next quarter (e.g., increasing the labs from 2-8) will result in increased demand on TCMO change delivery
- 4. Siloed understanding of change impacts:** Change impacts are only being assessed at the project level, and as a result there is a lack of understanding of the aggregated impact of Programme initiatives on stakeholders
- 5. Absence of Change Management metrics tracking & reporting:** There is an immediate need to develop and activate a consistent approach to tracking and reporting on change management across the Programme

Potential Impacts & Considerations

- As the Programme is focused on **accelerating the delivery** of digital services over the next quarter, there is an **immediate need** to better understand the **aggregated impact** of these changes on the impacted sectors and branches
- TCMO Resource capacity demands** are expected to **increase** as the **journey labs ramp up**; TCMO will be delivering change management through the milestones and post MVP, placing greater demand on TCMO to provide **change plan delivery** support
- Programme initiatives with embedded change resources (e.g. Cloud Connectivity) will **report to TCMO on change metrics, issues management**, etc., and TCMO will work with these embedded change teams to ensure a consistent approach to the delivery of change
- Given the **high-volume** of **change activity** anticipated over the next quarter it is critical that CM **reporting mechanisms** and **processes** are established and aligned across programme initiatives
- TCMO will be actively working with the projects to continue to **monitor** and **proactively identify** and **mitigate people related risks**
- TCMO will also continue to provide **coaching opportunities** for project leads and **reinforce new ways of working** and of sharing **learnings** across projects

23 Initiatives
on the Roadmap

4 Initiatives
starting Q1





20 Initiatives
inflight in Q1

8 Initiatives
require change
plan delivery

6 Initiatives
require tools &
coaching

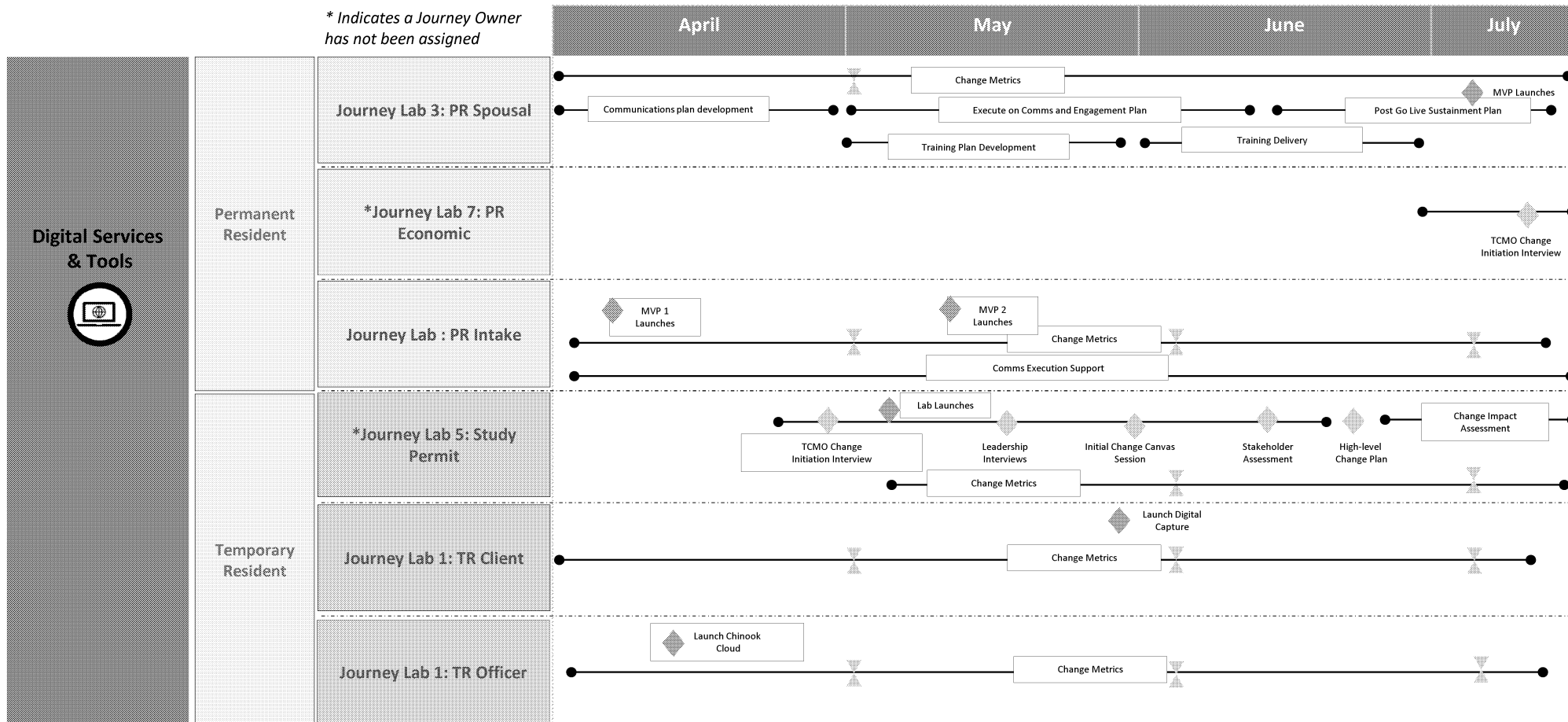
Transformation Programme Change Risks & Mitigations





Through our initial assessment of the roadmap initiatives the TCMO has identified potential risks and developed proposed mitigations for the Programme to take into consideration.

	Digital Services & Tools	Stabilized Platform	Our People	Programme Foundations
Focus Area	 <p>Developing and launching fast, simple and clear digital services and tools for clients and officers. Partnering with industry to integrate solutions quickly.</p>	 <p>Focused on stabilizing and standardizing our legacy systems and moving to the cloud (DPM Phase 1 and 2)</p>	 <p>Build a dynamic talent pipeline for Digital Platform Modernization, Labs and other digital initiatives, ensuring we have sustainable access to the right skill sets.</p>	 <p>Systematic effort to mobilize the Programme and foster enterprise-wide alignment to ensure IRCC is equipped to deliver against its modernization plans</p>
Risks	<ul style="list-style-type: none"> High volume of labs ramping up over the next quarter could increase change fatigue and a lack of buy-in or support for changes Lack of clear understanding of the aggregate impacts of changes on the networks as a result of the various inflight labs Post MVP launch, labs will continue to require CM support 	<ul style="list-style-type: none"> Change Management for DPM will be handled by a team of embedded change resources vs. DR which is being delivered by TCMO which could result in inconsistent methods, tools, and reporting requirements Lack of understanding around the aggregate impact of DPM phase 1 and 2 initiatives on stakeholders 	<ul style="list-style-type: none"> Limited ability for recruitment of digital talent to keep pace with ramp up in transformation initiatives (e.g. labs) Lack of clarity around transformation capabilities and the digital skills and competencies required to drive transformation in the medium/long term 	<ul style="list-style-type: none"> Programme initiative intake process and gating requirements not clearly defined resulting in a lack of clarity around “true” roadmap initiatives There are initiatives not on the roadmap, but which may have dependencies to roadmap initiatives Highest volume of change activity across the Programme is in June
Proposed Mitigation Activities	<ul style="list-style-type: none"> Consider how the lab's are launched moving forward and develop an approach to addressing post MVP change needs Develop an aggregate view of the change impacts of inflight labs and assess the readiness of impacted stakeholders 	<ul style="list-style-type: none"> Provide new DPM change resources with coaching on TCMO tools, methods and metrics to be tracked to ensure consistency across Programme Need to ensure change management activities are being synchronously planned across DPM phase 1 and 2 initiatives 	<ul style="list-style-type: none"> Develop clearly defined digital skills and competencies maturity framework and a plan for how to scale the work of the Digital talent strategy so that skills and capabilities can be recruited and developed across IRCC more broadly 	<ul style="list-style-type: none"> Develop a clearly defined intake process that includes CM in the conversation Develop a strategy to identify and manage Programme dependencies Continue to develop more Programme level views of change

Transformation Programme Change Roadmap

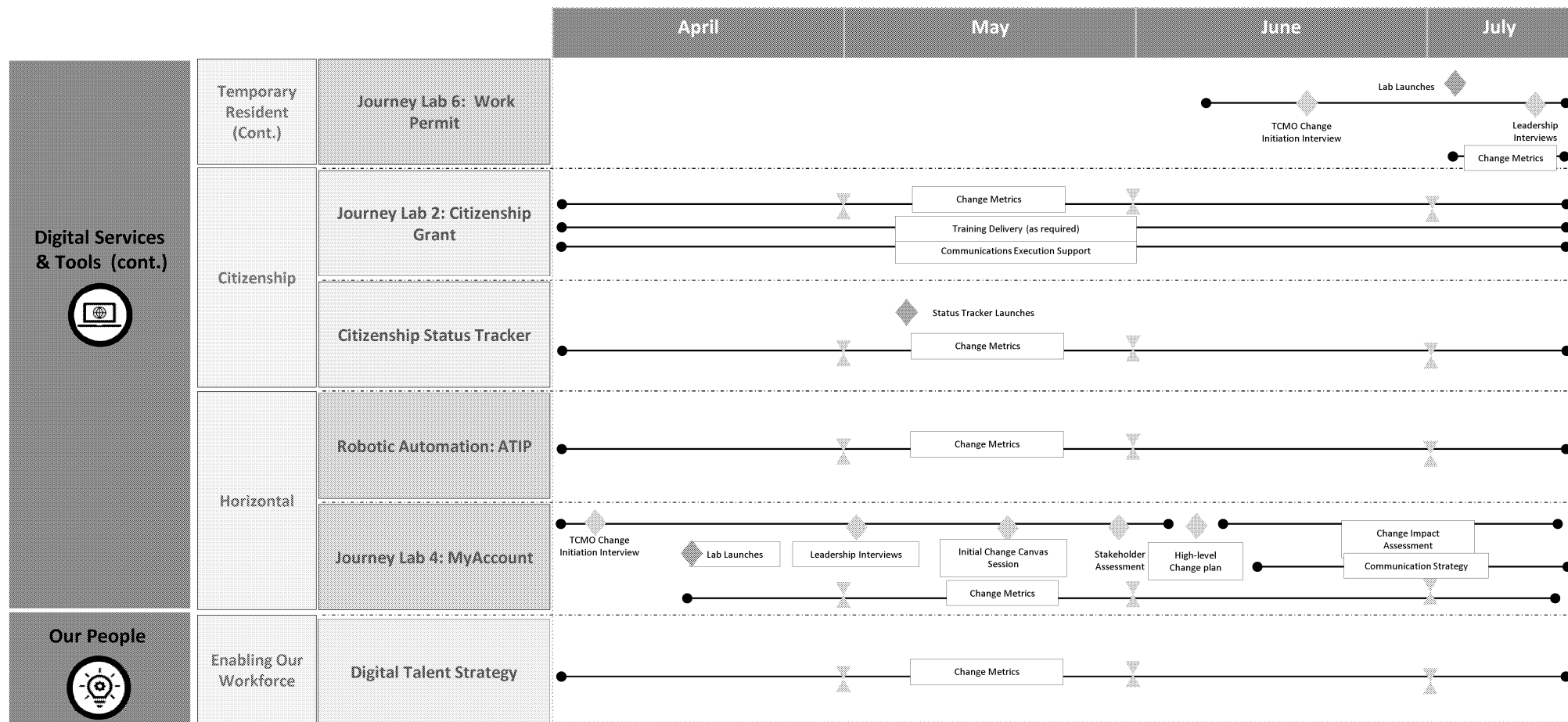
* Indicates a Journey Owner has not been assigned



Legend:
 TCMO Individual meeting or activity
  TCMO Status Update
  TCMO Ongoing Activity
  Project Milestone

Color Legend:
 TCMO  Project 

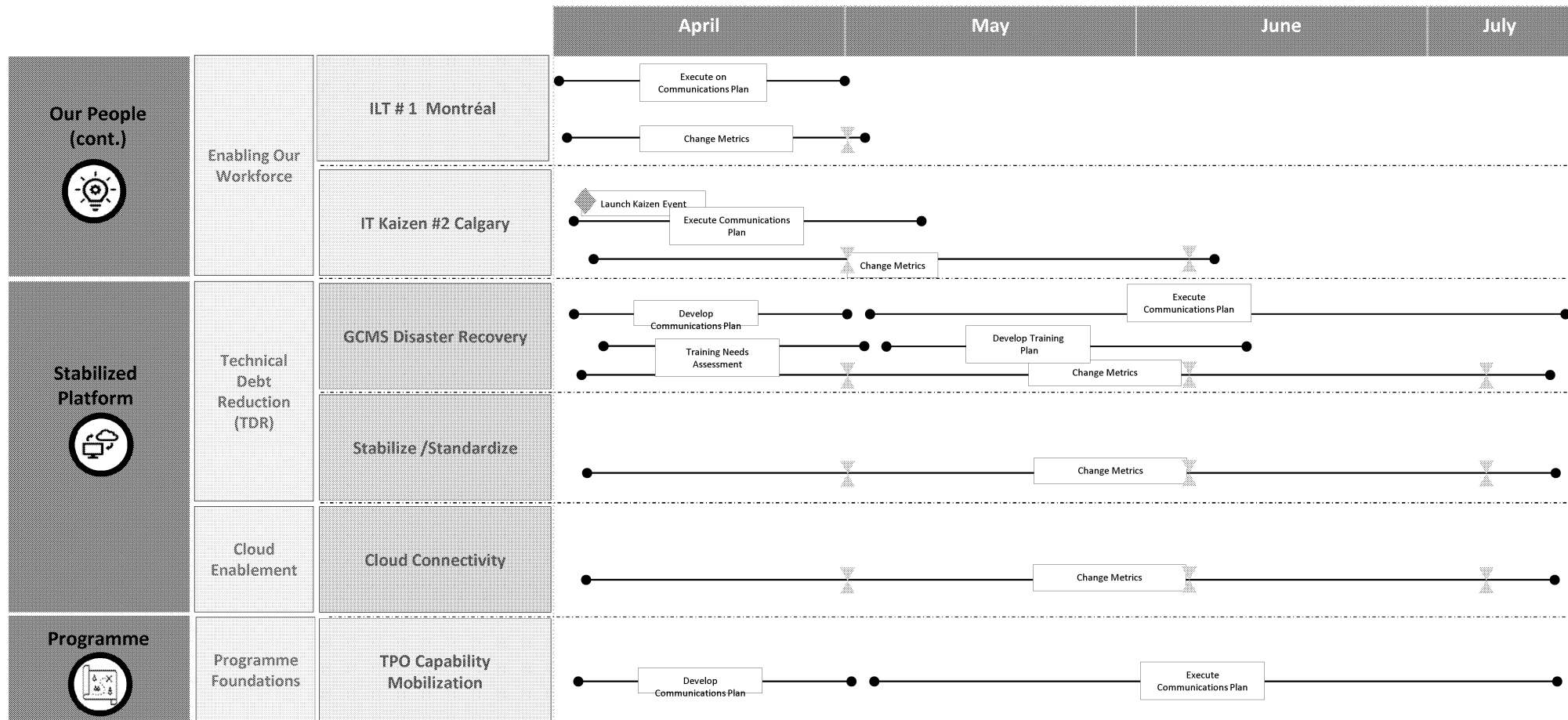
Transformation Programme Change Roadmap









Legend:
 TCMO Individual meeting or activity
 TCMO Status Update
 TCMO Ongoing Activity
 Project Milestone

Color Legend:
 TCMO
 Project

Transformation Programme Change Roadmap



Legend:
 TCMO Individual meeting or activity
  TCMO Status Update
  TCMO Ongoing Activity
  Project Milestone

Color Legend:
TCMO 
Project 



Next Steps

Key questions for consideration...

- What will be the approach to monitoring and tracking initiatives not represented on the roadmap, which may have dependencies on Programme initiatives (e.g., TR to PR pathway, other RPA initiatives)?
- What will be the approach/process that will allow TCMO to proactively respond to the evergreen characteristics of the Transformation Roadmap?
- Are there opportunities to integrate CM as part of the Transformation Programme initiative intake process?

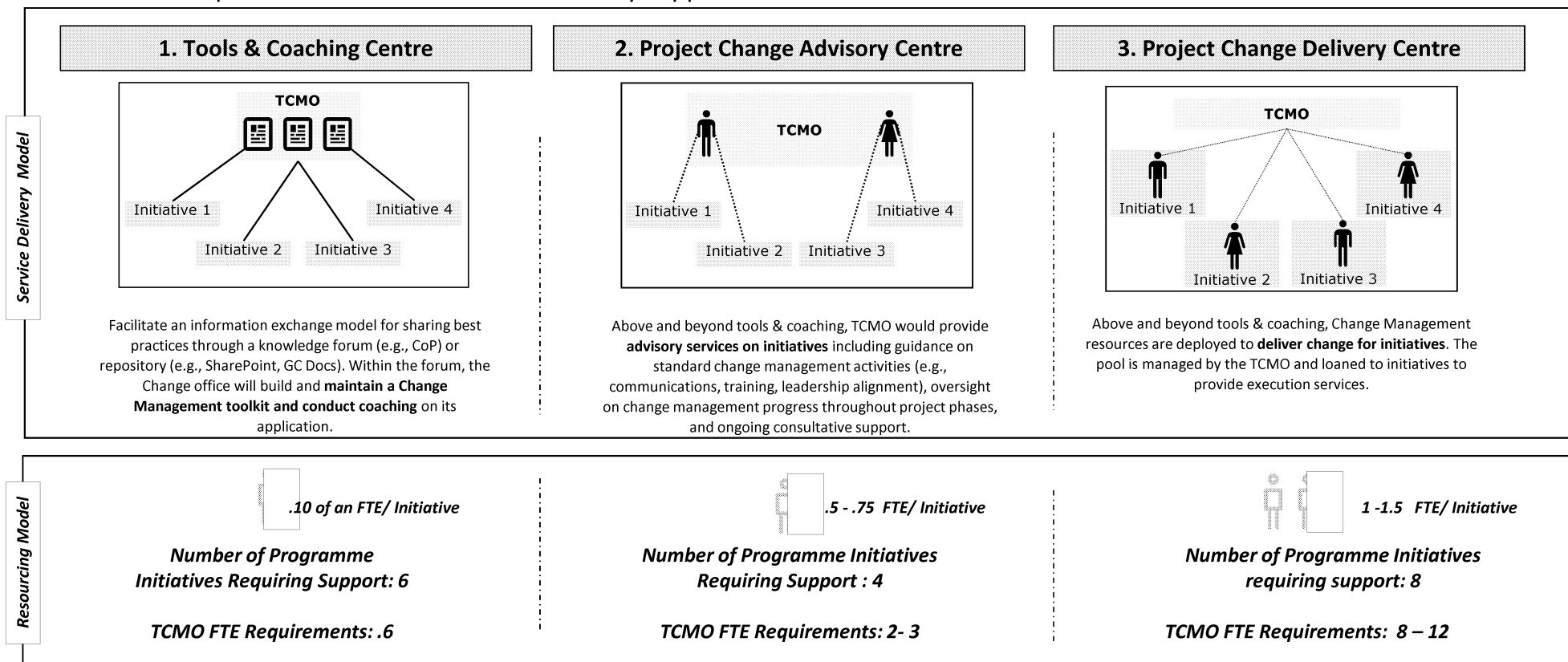
Next steps to move forward...

- 1** Update Transformation Programme Change Roadmap based on feedback provided and socialize updated roadmap for final review
- 2** Continue to engage project leads to provide change management support such as training/coaching, Change Management plans, and advisory support
- 3** Define change metrics and KPIs to be tracked, and reporting mechanisms at project and Programme level; test framework and refine as required

Appendix A - Change Assessment By Initiative

Projected FTE Requirements | April - July 2021 (Q1)

Below are projected TCMO FTE requirements for Q1 based on our assessment of the Transformation Programme roadmap initiatives and the anticipated level of TCMO service delivery support



Total Anticipated TCMO Resource Requirements = 10.6 - 15.6 FTE

Initiative Assessment Overview | April – July 2021 (Q1)

	Line of Business	Initiatives	Initiative Status	TCMO Involvement/ Anticipated		Level of Support	FTE Requirements	
				Tools & Coaching	Advisory	Change Plan Delivery	Low	High
Our People	Digital Talent Engine	Digital Talent Engine	In progress	X			.1	.1
	ILT Kaizen Events	Event 1: Montreal Office Citizenship	In progress		X		.5	.75
		Event 2: Calgary Office	In progress		X		.5	.75
Digital Services and Tools	Permanent Resident	Journey Lab: PR Digital Intake	In progress		X		1	1.5
		Journey Lab 3: PR Spousal	In progress			X	1	1.5
		Journey Lab 7: PR Economic	Not started			X	1	1.5
	Temporary Resident	Journey Lab 1a: TRV Officer	In progress	X			.1	.1
		Journey Lab 1b: TRV Client	In progress	X			.1	.1
		Journey Lab 5: Study Permit	Not Started			X	1	1.5
		Journey Lab 6: Work Permit	Not Started			X	1	1.5
	Citizenship	Journey Lab 2: Citizenship Grant	In Progress		X		.5	.75
		Citizenship Status Tracker	In Progress		X		.5	.75
	Horizontal	Robotic Automation - AITP	In Progress	X			.1	.1
		Journey Lab 4: My Account	Not started			X	1	1.5
Stabilized Platform	Technical Debt Reduction	GCMS Disaster Recovery	In Progress			X	1	1.5
		Stabilize/ Standardize	In progress	X			.1	.1
		Seibel Upgrade						
		Hybrid Integration						
	Ways of Working							
Cloud Enablement	Cloud Adoption and Connectivity	In progress	X			.1	.1	
Programme Mobilization	Programme Foundations	Digital Strategy	In progress			X	1	1.5
		TPO Design						
		TPO Capability Mobilization						
							10.6	15.6

Our People

Change Interview Assessment | Digital Talent Engine

Project Status:

In Progress

Project Findings

- The Digital Talent Engine (DTE) is a **Core enabler** for the ensemble of the Digital Journey Labs (also known as Digital Factory) by enabling the launch of the next Digital Labs' foundational hiring needs, solidifying a mission-focused workforce plan.
- Goal of DTE is to rethink and put into place an updated approach to how to identify, recruit and develop the next generation of digital talent for IRCC (including long term partnerships throughout the tech community across Canada).
- Has implemented a sustainable day-to-day Agile approach, with cadenced demo, retro, and stand-up ceremonies. Currently, the DTE has completed MVP and is in week 12/25 of sprints. Comprehensive North Star vision supported by Roadmap.
- DTE is also exploring upscaling of current employee digital literacy & competency as Department transitions into the Digital world. Questions around long term vision of transformation and future obsolete roles and responsibilities (such as data entry) are of real concern to the DTE

Main Considerations for Change Plan Delivery

Stakeholder Assessment:

- Works in partnership with HR, IT Ops, Comms, Security, Legal and Classification. Engaged in weekly Agile sprints with stakeholders. DTE is also developing partnership in post secondary institutions and other departments. There is stakeholder alignment on priorities for managing and retaining existing and newly acquired digital talent

Leadership & Engagement:

- DTE maintains Senior Leadership up to date with activities and seeks guidance resulting in sponsorship of the DTE mandate.
- DTE continues to actively engage all Journey Lab members to support the DTE.
- Concerned organization preparedness of Transformation over the next 5-10 years

Communication & Messaging:

- DTE requires support in providing consistent, transparent and featured messaging to showcase their activities within IRCC. Project lead mentioned that their pilot is not known throughout IRCC, hence creating doubling of efforts where DTE has already had successes with their operating model.

Training:

- DTE has developed onboarding tools for new employees including a buddy system, IT support and equipment. No CM training offered during onboarding

Measurement & Reinforcement:

- TBD

Service Delivery

Tools and Coaching .10 FTE

Change Interview Assessment | ILT #1 - Montreal

Project Status:

In Progress

Project Findings

- High level CM generic template has been developed by TCMO and the CPPB change team for Kaizen projects to formally capture CM and Lean activities that have been completed as well as proposed activities based upon observations gathered by TCMO/CPPB.
- Change management planning and activities have kicked off for ILT's Kaizen Project. TCMO and CPPB change team have contributed to ILT's change plan and will also be ILT's change capacity by providing change plan delivery.
- The project is aiming to optimize workload distribution between the Citizenship Montreal teams, increase processing and structural efficiency, encourage knowledge sharing through mentorship, workshops and cross-training between employees at all levels.
- Duration of project is expected to be 8 weeks, from February 1 to March 31 2021. The duration of the Project might be extended.

Main Considerations for Change Plan Delivery

Stakeholder Assessment:

- The impact assessment will take place during week 7 or 8 of the project. During these periods the change solutions will be formed thus the need of the impact assessment.

Leadership & Engagement:

- TCMO and the CPPB change team have touchpoints once or twice a week.
- TCMO participate in ILT's Kaizen project team Daily stand-ups on Wednesday to be updated

Communication & Messaging:

- A Communication plan and a Lean FAQs document have been developed by ITL and TCMO and the CPPB change team will contribute by establishing some key messages, and some high level messaging from the Citizenship Director will be developed.

Training:

- TCMO coordinated the CM 'Leading through change' workshop with ECMB to ILT's kaizen project team on January 26th and with the Montreal staff on February 9th.
- ILT facilitated the Lean Six Sigma training with the Kaizen project team on January 26th and with the Montreal teams on February 15th.

Measurement & Reinforcement:

- TBC



Service Delivery

Project Advisory .50 - .75 FTE

Change Interview Assessment | ILT #2 - Calgary

Project Status:

In Progress

Project Findings

- High level CM generic templates have been developed by TCMO and the CPPB change team for Kaizen projects to formally capture CM and Lean activities as well as proposed activities based upon observations gathered by TCMO/CPPB change team.
- Change management planning and activities have not kicked off for ILT's Calgary Kaizen Project. TCMO and CPPB change team will contribute to ILT's change plan and will also be ILT's change capacity by providing change plan delivery.
- The ILT Calgary Kaizen project team is not finalised yet. TCMO and the Calgary Kaizen lead had a preliminary discussion and the CM plan from the previous Kaizen project is being leveraged for the Calgary Kaizen project.
- The project is aiming to optimize workload distribution between the Citizenship Calgary teams, increase processing and structural efficiency, encourage knowledge sharing through mentorship, workshops and cross-training between employees at all levels.
- Duration of project is expected to be 8 weeks

Main Considerations for Change Plan Delivery

Stakeholder Assessment:

- The Calgary Kaizen project impact assessment date will be determined once the CM plan will be finalized.

Leadership & Engagement:

- The Calgary Kaizen Project lead had preliminary discussion with TCMO
- TCMO and the Calgary ILT Kaizen Project team will have touchpoints once or twice a week.
- TCMO will participate in ILT's Calgary Kaizen project team Daily stand-ups

Communication & Messaging:

- A Communication plan will be developed by ITL and TCMO and the CPPB change team will contribute by establishing some key messages, a Lean FAQ and some high-level messaging from the Citizenship Director will be developed.

Training:

- TCMO coordinated the CM 'Leading through change' workshop to ILT's kaizen project team
- ILT will facilitate the Lean Six Sigma training with the Kaizen project team
- The training plan tool will be developed by TCMO and provided to ILT in order to track training sessions that will take place and to plan future training sessions.

Measurement & Reinforcement:

- TBC



Service Delivery

Project Advisory .50 - .75 FTE

Digital Services & Tools

Change Interview Assessment | DJL #1a - TRV Officer

Project Status:

In Progress

Project Findings

- Officer team is currently working on cloud version of Chinook; a similar version of the tool is already used widely within the processing networks
- Sprinting is currently in progress to migrate this tool from excel to a cloud- based platform as a result of the IT security issues – moving to cloud is essential to addressing these IT concerns
- Although the tool is familiar to officers, the user interface of the new cloud -based tool will be different. There is a need to highlight that the overall concept of chinook is not changing and that is designed for officers by officers
- Testing of the new Chinook tool has started with officers and users and the project is wanting to go to a wider deployment in April as there will be a large focus on study permits need to get going on our change management
- There is informal knowledge that the new tool is coming, and it is anticipated it will be positively received, however there is concern that if officers and managers find the new tool to be less effective it will result in some resistance (e.g. due to any lost productivity)
- PWC change plan delivery support has been secured for the lab through an existing IN contracting vehicle, however there is concern they will not be engaged in time to deliver on the Lab's immediate communications and training needs

Main Considerations for Change Plan Delivery

Stakeholder Assessment:

- Main stakeholders impacted by the launch of the new cloud-based Chinook tool will be the International Network, there may be certain groups in the Centralized Network and Domestic Network that are impacted as well

Leadership & Engagement:

- Testers have been identified and are comprised of a large group of specialist officers (for their skill level and experience) across the IN network –considerations for how they will be prepared in terms of messaging and documentation to make it easy for them to participate

Communication & Messaging:

- There is a need for communications around the urgency of the need to move from excel to cloud, and how the cloud chinook solution is being developed in an agile manner
- As the tool will be continuously iterated, stakeholders will need to know how the solution will evolve overtime and that there is an opportunity for those using the tool to help advise on how to improve the product

Training:

- Project team requires support in finalizing the user manuals and demo videos, which will be used to support officers in navigating the new Chinook interface

Measurement & Reinforcement:

- **No** change metrics have been tracked to date

Service Delivery

Tools and Coaching .10 FTE

Change Interview Assessment | DJL #1b -TRV Client

Project Status:

In Progress

Project Findings

- Currently there is no change resources assigned to deliver CM support against the TRV Client Lab
- The lab's initial MVP resulted in changes to the seek component of the client facing application -Change impacts to internal IRCC stakeholder have been minimal
- The lab is currently in the Development phase and is working towards launching a mobile application that will support with reading of client passports and will automatically populate the information - expected to launch in the summer 2021
- To date, minimal change activities have been delivered in support of the lab as changes have been largely client facing
- Broad objective of change management for TRV Client is awareness and keeping stakeholders informed
- There is interest from internal stakeholders around the digital capture functionality and mobile app, despite only being minimally impacted by it

Main Considerations for Change Plan Delivery

Stakeholder Assessment:

- The changes although low in impact will be experience by processing officers within all the networks, which process TRV applications, including IN, CN, DN , who are already experience high levels of changes - changes brought forth from the launch of the digital capture application tool must be placed within the context of other changes happening within the networks

Leadership & Engagement:

- Leadership and engagement activities around TRV Client have been minimal, however there is a high level of interest amongst the Programme and from policy around the lab
- Virtual walk throughs of the tool have been completed however these engagement activities were not specific to showcasing the TRV solution – considerations around engagement activities focused on TRV Client solutions

Communication & Messaging:

- To date no formal communications plan has been developed, and communications activities have been largely ad hoc and directed by internal committees
- There is a need for additional communications to drive early buy-in as preparation for the launch of Digital Capture (i.e., communications to focus on the benefits for officers of the mobile application which will help to alleviate the verification of applicant travel document data)

Training:

- Processing Officers will need to be informed of the new Digital capture functionality and understand the benefits of the tool and how it will reduce the volume of manual work

Measurement & Reinforcement:

- No metrics have been defined to date, however there is a need to gain a better understanding of stakeholder buy-in and the effectiveness of communications

Service Delivery

Tools and Coaching .10 FTE

Change Interview Assessment | DJL #2 - Citizenship Grant

Project Status:

In Progress

Project Findings

- Initial MVP launched on 30/11/ 2020 but only 10% of clients have access to it. An intake tool went live in early December and is currently being used within the Centralized Network to process, finalize and input online application into GCMS (Only two employees are working on the new system as BAU)
- Testers have been identified by the impacted areas and are currently identifying glitches and connectivity issues with GCMS. Once the MVP will reach its full functionality the tool will be expanded to a larger population
- They want to expand the MVP to 55+ categories available to clients but currently waiting for the senior management decision on whether the percentage of applications need to increase or if only 10% of clients will have access
- CM planning and activities have kicked off and TCMO and the CPPB change team have collaborated in the development of the MVP change plan and will also be the project change capacity by providing change plan delivery. The TCMO and the CPPB change team have weekly meetings with the SMEs to collect feedback
- Q1 functionality should be completed by May - currently discussions at the ADM level on the commitment to process 180 applications for the lab to get the data they need as the processing time from end-to end is currently at 18 months



Service Delivery

Project Change Delivery 1- 1.5- FTE

Main Considerations for Change Plan Delivery

Stakeholder Assessment:

- TCMO and the CPPB change team conducted an impact assessment with the SMEs and conducted a pulse survey

Leadership & Engagement:

- TCMO and the CPPB change team commit approximately two hours per week. This includes working group sessions with the SMEs and other working group between TCMO and the CPPB change team on the project deliverables. Once the MVP will be fully launched the work time commitment will significantly increase

Communication & Messaging:

- The CPPB change Management team with TCMO's support leads the messaging that comes out from the CPPB DG to all CIT program
- The CPPB CM team and TCMO working group drafted a MVP FAQs to provide leaders and managers with key information to support conversations with staff about the MVP.

Training:

- A holistic training plan needs to be developed as the trainings are conducted as needed depending on the volume of application.
- The lab provided the initial training of the MVP with demos, information sessions and documentation.
- DN and CN will have the responsibility to provide trainings to employees and two employees will become in house SMEs to support with training needs once the volume of applications will become higher.

Measurement & Reinforcement:

- TBD

Change Interview Assessment | Citizenship Status Tracker

Project Status:

In Progress

Project Findings

- The Citizenship status Tracker will have a soft launch on May 10th. The tool will provide daily updates or any action required from clients on their CIT grant application.
- Objective for the status tracker is to help reduce the currently high volume of calls received by the call-centre related to the Citizenship line of business (approx. 40% of all calls) ; call volume has been identified as a metric to track benefits of the tool
- To access the tool, clients will have to create an account. There's currently 223 thousand applications loaded in the system and there's a deployment draft plan to prompt clients to create accounts. To finalize the roll-out plan, 5 to 25 thousand clients need to test the function.
- There's a critical need for awareness and communications, as errors from officers will be seen by clients. Solutions, would be to refer the client directly to the officer or defer the questions to the Network.
- CM planning and activities have not kicked off and TCMO and the CPPB change team will be the project change capacity and collaborate to provide change support

Main Considerations for Change Plan Delivery

Stakeholder Assessment:

- Stratus tracker anticipated to have a positive impact on clients who will now be able to track updates to the status of their citizenship application through a portal (i.e., within 24 hour of the update being made within GCMS)
- Officers will be impacted as there will be increased levels of transparency with clients, and the margin for errors within GCMS significantly reduced – considerations around how this transparency will be managed
- Call Centre staff will also be impacted by the launch of the status tracker as it is expected that that the volume of calls received will decrease, and at the same time the complexity of client inquiries may also increase

Leadership & Engagement:

- N/A

Communication & Messaging:

- There's a need to develop a communications plan as conversations are taking place at the senior level. The Program owner would be the point of contact for any communications that need to be released.

Training:

Measurement & Reinforcement:



Service Delivery

Project Advisory .50 - .75 FTE

Change Interview Assessment | DJL #3 - PR SPCLP

Project Status:

In Progress

Project Findings

- The DJL PR Spousal Journey Lab currently does not have project change resource capacity to deliver against the lab
- The project consists of three key phases, which are building towards the launch of the initial PR spousal MVP for end of June/ July
- The launch of the MVP is tied to the work that is currently being completed on the PR Digital Intake Portal
- Activities have focused on baselining and understanding the current process and existing pain points for clients and employees
- Working sessions are held with SMEs from the various functional areas to advise on current processes and potential constraints to be considered during ZBD and Dream & Design
- The ZBD workshop introduced SMEs to design thinking and engaged them in a visioning exercise; a change canvas session following ZBD was delivered to ensure stakeholders are aligned to a common vision and can articulate the burning platform
- To support with setting the lab up for success, TCMO has delivered training workshops to SME's including, "Change and You" (engages SME's to consider their personal response to change), and "Leading through Change" (helps them to understand the qualities that support effective change leadership)



Service Delivery

Project Change Delivery 1- 1.5- FTE

Main Considerations for Change Plan Delivery

Stakeholder Assessment:

- Engaging a cross functional team of SMEs to better understand the current client journey from multiple views (i.e., policy, legal, privacy, finance, Ops) as the MVP will have an impact on a complex network of IRCC stakeholders
- Many of the stakeholders impacted by the lab (such as the various Networks), are also currently being impacted by several other Transformation initiatives and there is change fatigue within the department (i.e., change will need to consider how it is aligning with these other initiatives / viewing change in a holistic way)

Leadership & Engagement:

- Leadership is concerned that "no one is left behind" as IRCC moves to digital; a critical role for leaders will be to ensure impacted stakeholders feel supported and are being guided/ led through the PR Spousal transformation journey (i.e., considerations around how the change team can enable leader led change)

Communication & Messaging:

- Leadership has communicated that family reunification and the move to digital are departmental priorities; however, these communications have not yet fully drilled down/ cascaded to the employee level
- Key area of focus for communications will be on building awareness /readiness for PR Spousal changes , including helping employees understand what the drivers for change are and clarity on what is changing early on, so they feel prepared and better equipped to accept the changes .

Training:

- Developing the digital competencies and technological fluency of impacted stakeholders have been identified as critical to driving adoption of the MVP and establishing a foundation for the success of future releases

Measurement & Reinforcement:

- There is a need for metrics that help us to baseline the current morale of agents and officers within the impacted networks, and support with proactively identifying any fatigue or resistance

Change Interview Assessment | DJL – PR Digital Intake

Project Status:

In Progress

Project Findings

- PR Digital intake consists of: **Client-Facing Portal (MVP1)**, which will enable IRCC to receive applications electronically and will initially include PNP PR lines of business. The Portal will have a digital IMM0008, will allow applicants to upload additional forms and supporting documents electronically and confirm reception of application.
- A Case Worker Portal (MVP2)** the tool will retrieve client applications digitally and review them for completeness. Current functionality of portal does not allow for integration onto GCMS, therefore data entry/ file creation remains the same (no efficiency gained)
- To date change management has been reactive and responding to the request of the Networks - moving forward would like to take a more strategic approach to change plans.
- Tool launch dates have been **postponed**. MVP1 is aiming to launch in May 2021, no date set for MVP2.
- TCMO will need to assess what continued support will look like as additional functionalities are built in and the tool is phased into to additional LOB

Main Considerations for Change Plan Delivery

Stakeholder Assessment:

- There has not been any formal assessment done for this initiative. TCMO will be engaging DIP, IPG and CN to develop a more strategic approach going forward.

Leadership & Engagement:

- Given that this initiative will eventually encompass all of the PR lines of business, it is important that leadership from these various impacted teams is engaged and aligned around a common vision and objective.

Communication & Messaging:

- Draft FAQs document and one pager have been developed by TCMO and currently under review by IPG and CN. No final FAQ document at this time as the tool launch is delayed. Final version and distribution dependent on launch date of tool.
- TCMO drafted the Launch messages for the DG of the Centralized Network, however it was suggested that the message goes out from the ADM of Ops since change will impact multiple networks impacted to different degrees. Messaging is currently in the approval channels for ADM level.

Training:

- Training will be deployed to small number of employees from Centralized Intake Office (CIO) and they will become the SMEs to support training to the other LOB's. Deloitte will be delivering training. No set date at this time

Measurement & Reinforcement

- TBD



Service Delivery

Project Advisory .50 - .75 FTE

Change Interview Assessment | DJL #4 - MyAccount

Project Status:

In Progress

Project Findings

- MyAccount will be the first horizontal lab that DJL is embarking on – currently client portals are being developed in silo, however there is a desire to move to one platform and one login to access any applications, as well as create continuity in the stream of immigration
- The lab will have implications that go beyond IRCC as it is being led by GoC one account, which will enable clients to access all GoC services and leverage information from one department to another to avoid asking clients for information IRCC has access to
- The journey owner that has been identified is coming from the Client Experience Branch (CEB), where they were leading the team in charge of gathering the business requirements around MyAccount
- To date their analysis of MyAccount has largely focused on identifying an addressing the pain point of the business/officers – whereas the lab will now pivot and require the team to examine MyAccount from the perspective of the client
- Launch of the lab is aimed for the week of March 29

Main Considerations for Change Plan Delivery

Stakeholder Assessment:

- Given that MyAccount is a horizontal lab it will have impacts on and dependencies with other initiatives that will need to be assessed and closely monitored
- MyAccount will launch during several other transformation initiatives and the change team will need to consider how it is aligning with these other initiatives / viewing change in a holistic way as to mitigate change fatigue amongst the impacted lines of business

Leadership & Engagement:

- The project team from CEB who had been previously working on identifying business requirements for MyAccount will be engaged as SME's - potential risk that they will see the lab as a continuation of the previous work and will not apply the lab structure - expectations of SME's will need to be communicated early on

Communication & Messaging:

- Initial key messages delivered to SME's will need to highlight the features of the lab structure and how this is different from previous work completed on MyAccount

Training:

- "Change and You " training will be delivered before the formal launch of the lab to support with getting SME's in the right mindset

Measurement & Reinforcement:

- TBD



Service Delivery

Project Change Delivery 1- 1.5- FTE

Change Interview Assessment | RPA (ATIP)

Project Status:

In Progress

Project Findings	Main Considerations for Change Plan Delivery
<ul style="list-style-type: none"> 2 years, with flexible dates for milestones. IRCC received 60% of all ATIP requests, averaging 650 requests per day uploaded unto online platform. The RPA-ATIP aims to eliminate redundant steps of the initial data entry and shifting the focus to more meaningful analytical work. This will result in efficiency savings of 5-6 min per request, or 58 weeks of work per year. RPA –ATIP is first of a 7 phase of RPA initiatives. The other 6 phases are not listed on the Programme Roadmap at this time RPA-ATIP does not require Change Management support at this time as the impact is limited and no change in process. Change management planning has not yet kicked off for the rest of the 6 phases of RPA. To date, Bot will be going into production, however managing various ‘bugs’, therefore no formal release date. RPA Roadmap spans approximately 2 years. 	<p>Stakeholder Assessment:</p> <ul style="list-style-type: none"> RPA-ATIP will have limited impact, therefore no CM plans needed. However, there are 6 other phases to the RPA initiative that will have to be scoped out. To date, these are in the current state workflow process. <p>Leadership & Engagement:</p> <ul style="list-style-type: none"> TCMO will continue to engage Project Lead for all RPA initiatives to evaluate need and deliver CM tools and coaching. <p>Communication & Messaging:</p> <ul style="list-style-type: none"> TBD <p>Training:</p> <ul style="list-style-type: none"> Opportunity to deliver CM workshop may be present for future 6 phases of RPA <p>Measurement & Reinforcement:</p> <ul style="list-style-type: none"> TBC



Service Delivery

Tools and Coaching .10 FTE

Change Interview Assessment | DJL #5 - TRV Study Permit

Project Status:

Not Started

Project Findings	Main Considerations for Change Plan Delivery
<ul style="list-style-type: none"> No Journey Owner has been Assigned 	<p>Stakeholder Assessment:</p> <p>Leadership & Engagement:</p> <p>Communication & Messaging:</p> <p>Training:</p> <p>Measurement & Reinforcement:</p>



Service Delivery
Project Change Delivery 1- 1.5- FTE

Change Interview Assessment | DJL #6 - TRV Work Permit

Project Status:

Not Started

Project Findings	Main Considerations for Change Plan Delivery
<ul style="list-style-type: none"> No Journey Owner has been Assigned 	<div>Stakeholder Assessment:</div> <div>Leadership & Engagement:</div> <div>Communication & Messaging:</div> <div>Training:</div> <div>Measurement & Reinforcement:</div>



Service Delivery
Project Change Delivery 1- 1.5- FTE

Change Interview Assessment | DJL #7 - PR Economic

Project Status:

Not Started

Project Findings	Main Considerations for Change Plan Delivery
<ul style="list-style-type: none"> No Journey Owner has been Assigned 	<div>Stakeholder Assessment:</div> <div>Leadership & Engagement:</div> <div>Communication & Messaging:</div> <div>Training:</div> <div>Measurement & Reinforcement:</div>



Service Delivery

Project Change Delivery 1- 1.5- FTE

Stabilized Platform (DPM)

Change Interview Assessment | GCMS Disaster Recovery

Project Status:

In Progress

Project Findings

- DR is focused on creating a backup of GCMS and is work that is essential to setting the stage for DPM (i.e. there is a high level of dependency) - DR GCMS is expected to launch in May
- TCMO change team is accountable for delivering change for DR and is currently data gathering to better understand project milestones, as well as rollout plans for communications and training
- TCMO change team is also working to establish a regular cadence with the change liaison and tapping into different groups as DR Change management is currently being led by 3 distinct groups that are working on different components of the CM plan; there is opportunity to build and reinforce a more holistic approach and view of CM needs
- GCMS will be moving under the management of Shared Services Canada (SSC) and will no longer be housed or maintained by IRCC, as a result there will be impacts on of stakeholders within IT Ops who currently support with GCMS maintenance
- There is a joint SSC/project team working group that is currently developing an operating model for GCMS maintenance

Main Considerations for Change Plan Delivery

Stakeholder Assessment:

- IT operations stakeholders currently supporting GCMS maintenance will be impacted by the transition of GCMS to SSC

Leadership & Engagement:

- N/A

Communication & Messaging:

- Communications will play a large role for DR as there are several internal and external stakeholders/partners that will need to be kept informed on the progress of the initiative

Training:

- Training has been identified as a key milestone and has been tentatively planned to start in May ; further detail on training needs of impacted stakeholders is required

Measurement & Reinforcement:

- N/A




Service Delivery

Project Change Delivery 1- 1.5- FTE

Change Interview Assessment | TDR Stabilize/Standardize

Project Status:

In Progress

Project Findings	Main Considerations for Change Plan Delivery
<ul style="list-style-type: none"> Change management planning has not yet kicked off for the Technical Debt Reduction Stream The major initiative within TDR is DPM phase 3 which will result in the move to a new case management system In the interim the project is focused on stabilizing GCMS to reduce downtime Change management resource is currently being onboarded and will be embedded on TDR initiatives to deliver change As TDR will have its own change capacity; TCMO can anticipate tools and coaching approach to service delivery The change resources will report on change metrics up to the DPM Programme, which will then report to the TCMO and the Transformation Programme Office 	<p>Stakeholder Assessment:</p> <ul style="list-style-type: none"> N/A <p>Leadership & Engagement:</p> <ul style="list-style-type: none"> N/A <p>Communication & Messaging:</p> <ul style="list-style-type: none"> N/A <p>Training:</p> <ul style="list-style-type: none"> N/A <p>Measurement & Reinforcement:</p> <ul style="list-style-type: none"> N/A
<div>  <div> Service Delivery <i>Tools and Coaching .10 FTE</i> </div> </div>	

Change Interview Assessment | Cloud Connectivity

Project Status:

In Progress

Project Findings	Main Considerations for Change Plan Delivery
<ul style="list-style-type: none"> Change management planning has not yet kicked off for cloud connectivity The project is focused on stabilizing GCMS to reduce downtime Change management resource is currently being onboarded and will be embedded onto the cloud initiatives to deliver change As Cloud will have its own change capacity; TCMO can anticipate tools and coaching approach to service delivery The change resources will report on change metrics up to the DPM Programme, which will then report to the TCMO and the programme 	<div>Stakeholder Assessment:</div> <ul style="list-style-type: none"> N/A <div>Leadership & Engagement:</div> <ul style="list-style-type: none"> N/A <div>Communication & Messaging:</div> <ul style="list-style-type: none"> N/A <div>Training:</div> <ul style="list-style-type: none"> N/A <div>Measurement & Reinforcement:</div> <ul style="list-style-type: none"> N/A



Service Delivery

Tools and Coaching .10 FTE

Programme Mobilization

Change Interview Assessment | Transformation Office

Project Status:

In Progress

Project Findings

- TCMO had a meet and greet meeting on February 16th with the Programme in order to explain TCMO's role and start engaging with the Programme to establish a collaborative working relationship.
- TCMO and TO are still defining the change needs for the Programme.
- Change Management is critical for the Programme's deliverables hence TCMO will be TO's change capacity by providing change plan delivery
- The project is focused on mobilizing TO's Programme priorities and deliverables such as the roadmap, alignment between levers, sources talent and the link between the business case, execution of initiatives and realization of benefit

Main Considerations for Change Plan Delivery

Stakeholder Assessment:

- TCMO leveraged the TCMO stakeholder list and refined to the Programme.

Leadership & Engagement:

- Change Canvas Working session to help establish the future State took place on March 3th. During the working group session, TO has been introduced the 'behavior first change' in order to establish desired partner behavior and team norms. The report is being finalized and will be socialized with TO.

Communication & Messaging:

- The Communication strategy for TO's Programme has started and TCMO is still having discussion with TO define the Change Management needs
- Leveraged the impacted Programme stakeholder list to assess their Communications need

Training:

- Training for the Programme will focus on building CM capabilities to achieve this TCMO delivered:
 - TCMO facilitated 'Leading through change' workshop on February 25th
 - TCMO will facilitate 'Change and You' workshop

Measurement & Reinforcement:

- The Programme is working with TCMO to define metrics that will be tracked across the different initiatives to assess the effectiveness of CM activities



Service Delivery

Project Change Delivery 1- 1.5- FTE

TCMO
 Transformation
 Change
 Management
 Office

Appendix B – Transformation Programme Roadmap (January 2021)

The case for Transformation is more critical today than ever before

- **In 2019**, we launched transformation with an ambitious vision of “becoming the world leader in managed migration” by improving client service, driving operational excellence and maintaining program integrity.
- We have made **tremendous progress**, delivering digital services and tools faster than ever before, driven by new ways of working across silos of expertise and taking an end-to-end view from the client perspective.
- **Today**, the impact of COVID has only increased our need to move faster, forcing us to renew our commitment to the digital transformation of Canada’s immigration system.
- The digital services and capabilities we are building today through our Digital Labs, work hand in hand with near term efforts to stabilize our platforms and our longer term modernization plans.
- These are complementary and mutually reinforcing strategic efforts – driving our digital transformation in service of our broader levels commitments.

Key wins so far...

- ✓ **Fully digital temporary visitor** application process including **automation** of repetitive officer tasks.
- ✓ **Online confirmation of permanent residence** enabling clients to access services faster.
- ✓ Fully digital **end-to-end citizenship process** from intake to ceremony.
- ✓ **Funding secured** to stabilize our IT platforms.
- ✓ **Transformation Office** stood up driving governance, change management and **sourcing digital talent**.

Our focus in 2021: accelerating the delivery of digital services and tools, stabilizing the digital foundation for the future, and enabling our workforce to sustain transformation

To meet our ambitious levels targets, while improving client service, we require...

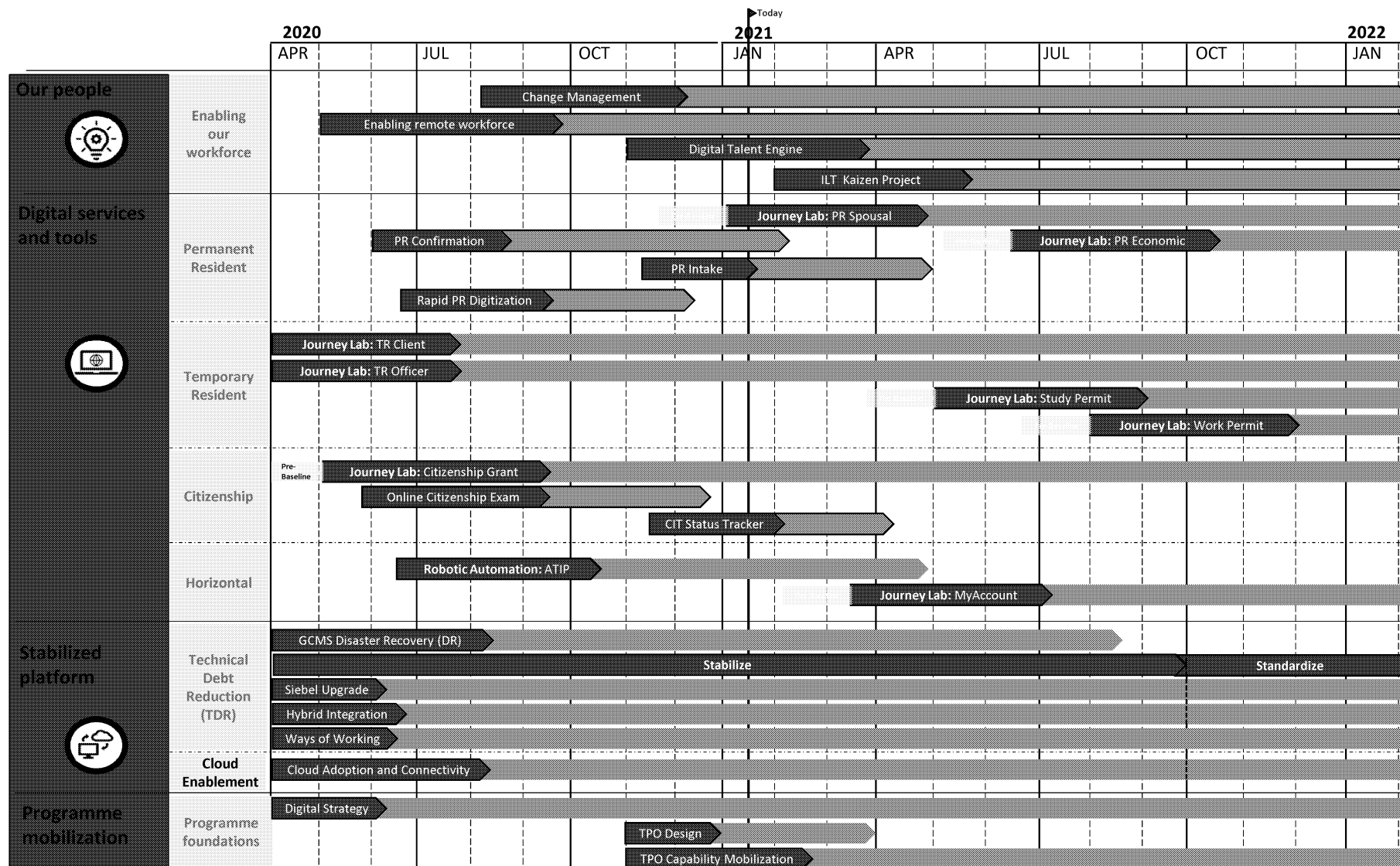


- ☐ faster and simpler **digital services and tools**,
- ☐ fully unlocked by a **stable** and nimble technical **platform**,
- ☐ and sustained by an **enabled workforce**.



Areas of focus for 2021	Description	Key objectives in 2021
Digital services and tools (Digital Journey Labs, Digital Industry Partnerships)	<ul style="list-style-type: none"> Developing and launching fast, simple and clear digital services and tools for clients and officers. Partnering with industry to integrate solutions quickly. 	<ul style="list-style-type: none"> Scaling from 2 to 8 digital journey labs Digital intake for TR, CIT, PR Spousal MyAccount 2.0 launched
Stabilized platform (DPM Phase I & II)	<ul style="list-style-type: none"> Stabilizing and standardizing our legacy systems Moving to the cloud 	<ul style="list-style-type: none"> Disaster recovery Siebel upgrade and hybrid integration Cloud connectivity and adoption
Our people (Change management, Transformation Programme Office & Digital Talent Engine)	<ul style="list-style-type: none"> Enabling remote workforce (e.g., adopting new digital tools & processes) Governing and managing change Sourcing the talent required to scale 	<ul style="list-style-type: none"> Implementing the Digital Talent Engine Launching program change strategy Lean process improvements to Citizenship

These areas of focus are underpinned by a systematic effort to **mobilize the Programme** and foster enterprise-wide alignment to ensure IRCC is equipped to deliver against its modernization plans

Our 12 month roadmap: meeting the rising digital needs of today while building stability for tomorrow



A Over the next 12 months, we are delivering key digital capabilities to enable a digital experience for clients, the department, and Canadians (1/3)

Our people 	Line of Business	Digital Initiative	Outcomes	Expected Results
	Enabling our workforce	Change Management	Change Management embedded as a discipline across the Transformation Programme to maximize planned benefits, foster new mindsets and ways of working	<i>Enable change readiness and the adoption of new tools, processes, and behaviours for employees. Adoption of new services by clients and partners.</i>
		Digital Talent Engine	Re-imagination of the way we identify, recruit and develop the next generation of digital talent for IRCC.	<i>Build a dynamic talent pipeline for Digital Platform Modernization, Labs and other digital initiatives, ensuring we have sustainable access to the right skill sets.</i>
		Enabling a remote workforce	Equipping our workforce to succeed in a digital environment	<i>Full deployment of MS Teams, Reservelt hotelling solution Distribution of monitors and IT equipment to enable working from home.</i>
Stabilized Platform 	Technical Debt Reduction (TDR)	Disaster Recovery (DR)	Modern disaster recovery enabled environment including hosting in new data centres and freedom from the current constraints of the JETS data centres.	<i>A stable platform enhancing and enabling key digital capabilities while setting the stage for the transition to a modernized platform of the future that will ensures long term stability and security</i>
		Technical Debt Reduction (TDR) and Cloud	De-risk and reduce “technical debt” in the current core legacy systems and remediate architectural deficiencies.	
	Cloud enablement	Cloud adoption and connectivity	Centralization and coordination of cloud adoption and enterprise-grade planning and implementation of cloud connectivity	

A

In the near term, we are delivering key digital capabilities to enable a digital experience for clients, the department, and Canadians (2/3)



Digital services and tools



Line of Business	Digital Initiative	Outcomes	Expected Results
Temporary Resident	Journey Lab: TR Client (Launched Nov 26)	Launch of TR eApp allows clients to learn about and apply for visitor programs through a fully digital, simple and clear process. (Upcoming Feature) Digital Capture will enable the ability to capture and validate information directly from a client's travel document online or through a mobile app	<i>Available to all TRV Clients by February 2021.</i> <i>Testing of phase 1 of the project (Prototype) is planned for Feb-March 2021.</i>
	Journey Lab: TR Officer (to be live, in production & in use early February)	Detailed Biometrics Data and admissibility info will facilitate officer reviews via automated administrative tasks, enabled and stabilized by migrating Chinook to the cloud	<i>Automation roll-out to all overseas offices Winter 2021, increasing officer productivity and efficiency.</i>
	Journey Lab: Study Permit (lab launches in May*)	Re-designed client journey to improve client experience and Officer productivity.	<i>Fully digital application process with automation of officer tasks.</i>
	Journey Lab: Work Permit (lab launches in August*)	Re-designed client journey to improve client experience and Officer productivity.	<i>Fully digital application process with automation of officer tasks.</i>
Citizenship	Citizenship Online Exam (Launched and stabilizing)	Enables applicants to complete their citizenship knowledge testing online.	<i>Started with ~5000 since launch, scaling up to clear backlog of 87K.</i>
	Journey Lab: Citizenship Grant (online application, ages 18-54, to be live, in production & in use early December)	Agent intake and processing – agents will now be able to intake and process applications remotely.	<i><u>Ability to accept 25k applications electronically for 18-54 year olds (35% of volumes) in next 6 months, expanded to 100% of applications (~250k) in following 12 months.</u></i> <i>Increased processing efficiency to enable up to 40k additional applications processed next fiscal.</i>
	Citizenship Case Status Tracker (Launched and stabilizing)	Enables applicants to review their case status in the context of the major milestones and processing steps.	<i>Improves client satisfaction with IRCC and more transparency leading to fewer inquiries and ATIPs</i>

A

In the near term, we are delivering key digital capabilities to enable a digital experience for clients, the department, and Canadians (3/3)



Line of Business	Digital Initiative	Outcomes	Expected Results
Permanent Resident	PR Confirmation (complete – live, in production & in use)	Allows clients to obtain their PR card and entitlement to all benefits, and allows IRCC to address its backlog.	<i>Ability to electronically process 100-200 landings per day, once stable, 300 per day.</i>
	PR Application Rapid Digitization (complete – initial solution live, in production & in use)	Leveraging a partner to digitize backlog of paper PR applications to enable remote processing and support levels commitments.	<i>Contract capacity for 6000 PR files per week now available. Engaging with procurement to understand the options at scale. Long-term DPM will transform this business to 'born digital' thus eliminating paper records.</i>
	Journey Lab: PR Spousal (lab launches in early January)	Re-designed client journey to improve client experience and Officer productivity.	<i>PR Spousal Lab has been stood up, developing and executing roadmap to gain the ability to digitally intake and process the ~70k spousal applications received annually.</i>
	Journey Lab: PR Economic (lab launches in June*)	Re-designed client journey to improve client experience and Officer productivity.	<i>Addresses key business resumption priority tied to Canada's economic recovery while aligning to ongoing PR digitization initiatives .</i>
	PR Intake (development kicked-off)	A digital intake service for PR clients to submit an application without the need to use paper, snail mail, or in-person services	<i>Increased application intake; alternative intake channel; reduction in incomplete applications; and reduced calls to IRCC call centre</i>
Horizontal	ATIP process automation (RPA) (to be live, in production & in use November)	Allows IRCC to address its ATIP backlog, focus resources to higher value activities, and increase compliance.	<i>Assist in officer efficiencies.</i>
	Journey Lab: MyAccount (lab launches February-March)	A modern account to manage client transactions with IRCC.	<i>Accelerate digital while improving client satisfaction with IRCC and more transparency leading to fewer inquiries and ATIPs</i>

Digital services and tools



Task Authorization Autorisation de tâche

Instruction for completing the form PWGSC - TPSGC 572 - Task Authorization
(Use form DND 626 for contracts for the Department of National Defence)

Contract Number

Enter the PWGSC contract number.

Contractor's Name and Address

Enter the applicable information

Security Requirements

Enter the applicable requirements

Total estimated cost of Task (Applicable taxes extra)

Enter the amount

For revision only

TA Revision Number

Enter the revision number to the task, if applicable.

Total Estimated Cost of Task (Applicable taxes extra) before the revision

Enter the amount of the task indicated in the authorized TA or, if the task was previously revised, in the last TA revision.

Increase or Decrease (Applicable taxes extra), as applicable

As applicable, enter the amount of the increase or decrease to the Total Estimated Cost of Task (Applicable taxes extra) before the revision.

1. Required Work: Complete sections A, B, C, and D, as required.

A. Task Description of the Work required:

Complete the following paragraphs, if applicable.
 Paragraph (a) applies only if there is a revision to an authorized task.

(a) Reason for revision of TA, if applicable:
 Include the reason for the revision; i.e. revised activities; delivery/completion dates; revised costs. Revisions to TAs must be in accordance with the conditions of the contract. See Supply Manual 3.35.1.50 or paragraph 6 of the Guide to Preparing and Administering Task Authorizations.

(b) Details of the activities to be performed (include as an attachment, if applicable)

(c) Description of the deliverables to be submitted (include as an attachment, if applicable).

(d) Completion dates for the major activities and/or submission dates for the deliverables (include as an attachment, if applicable).

Instruction pour compléter le formulaire PWGSC - TPSGC 572 - Autorization de tâche
(Utiliser le formulaire DND 626 pour les contrats pour le ministère de la Défense)

Numéro du contrat

Inscrire le numéro du contrat de TPSGC.

Nom et adresse de l'entrepreneur

Inscrire les informations pertinentes

Exigences relatives à la sécurité

Inscrire les exigences pertinentes

Coût total estimatif de la tâche (Taxes applicables en sus)

Inscrire le montant

Aux fins de révision seulement

Numéro de la révision de l'AT

Inscrire le numéro de révision de la tâche, s'il y a lieu.

Coût total estimatif de la tâche (Taxes applicables en sus) avant la révision

Inscrire le montant de la tâche indiquée dans l'AT autorisée ou, si la tâche a été révisée précédemment, dans la dernière révision de l'AT.

Augmentation ou réduction (Taxes applicables en sus), s'il y a lieu

S'il y a lieu, inscrire le montant de l'augmentation ou de la réduction du Coût total estimatif de la tâche (Taxes applicables en sus) avant la révision.

1. Travaux requis : Remplir les sections A, B, C et D, au besoin.

A. Description de tâche des travaux requis :

Remplir les alinéas suivants, s'il y a lieu : L'alinéa (a) s'applique seulement s'il y a révision à une tâche autorisée.

(a) Motif de la révision de l'AT, s'il y a lieu : Inclure le motif de la révision c.-à.-d., les activités révisées, les dates de livraison ou d'achèvement, les coûts révisés. Les révisions apportées aux AT doivent respecter les conditions du contrat. Voir l'article 3.35.1.50 du Guide des approvisionnements ou l'alinéa 6 du Guide sur la préparation et l'administration des autorisations de tâches.

(b) Détails des activités à exécuter (joindre comme annexe, s'il y a lieu).

(c) Description des produits à livrer (joindre comme annexe, s'il y a lieu).

(d) Les dates d'achèvement des activités principales et (ou) les dates de livraison des produits (joindre comme annexe, s'il y a lieu).

B. Basis of Payment:

Insert the basis of payment or bases of payment that form part of the contract that are applicable to the task description of the work; e.g. firm lot price, limitation of expenditure, firm unit price

C. Cost of Task:

Insert Option 1 or 2:

Option 1:

Total estimated cost of Task (Applicable taxes extra): Insert the applicable cost elements for the task determined in accordance with the contract basis of payment; e.g. Labour categories and rates, level of effort, Travel and living expenses, and other direct costs.

Option 2:

Total cost of Task (Applicable taxes extra): Insert the firm unit price in accordance with the contract basis of payment and the total estimated cost of the task.

D. Method of Payment

Insert the method(s) of payment determined in accordance with the contract that are applicable to the task; i.e. single payment, multiple payments, progress payments or milestone payments. For milestone payments, include a schedule of milestones.

2. Authorization(s):

The client and/or PWGSC must authorize the task by signing the Task Authorization in accordance with the conditions of the contract. The applicable signatures and the date of the signatures is subject to the TA limits set in the contract. When the estimate of cost exceeds the client Task Authorization's limits, the task must be referred to PWGSC.

3. Contractor's Signature

The individual authorized to sign on behalf of the Contractor must sign and date the TA authorized by the client and/or PWGSC and provide the signed original and a copy as detailed in the contract.

B. Base de paiement :

Insérer la base ou les bases de paiement qui font partie du contrat qui sont applicables à la description du travail à exécuter : p. ex., prix de lot ferme, limitation des dépenses et prix unitaire ferme.

C. Coût de la tâche :

Insérer l'option 1 ou 2

Option 1 :

Coût total estimatif de la tâche (Taxes applicables en sus) Insérer les éléments applicables du coût de la tâche établies conformément à la base de paiement du contrat. p. ex., les catégories de main d'œuvre, le niveau d'effort, les frais de déplacement et de séjour et autres coûts directs.

Option 2 :

Coût total de la tâche (Taxes applicables en sus) : Insérer le prix unitaire ferme conformément à la base de paiement du contrat et le coût estimatif de la tâche.

D. Méthode de paiement

Insérer la ou les méthode(s) de paiement établit conformément au contrat et qui sont applicable(s) à la tâche; c.-à.-d., paiement unique, paiements multiples, paiements progressifs ou paiements d'étape. Pour ces derniers, joindre un calendrier des étapes.

2. Autorisation(s) :

Le client et (ou) TPSGC doivent autoriser la tâche en signant l'autorisation de tâche conformément aux conditions du contrat. Les signatures et la date des signatures appropriées sont assujetties aux limites d'autorisation de tâche établies dans le contrat. Lorsque l'estimation du coût dépasse les limites d'autorisation de tâches du client, la tâche doit être renvoyée à TPSGC.

3. Signature de l'entrepreneur

La personne autorisée à signer au nom de l'entrepreneur doit signer et dater l'AT, autorisée par le client et (ou) TPSGC et soumettre l'original signé de l'autorisation et une copie tel que décrit au contrat.



Task Authorization Autorisation de tâche

Contract Number - Numéro du contrat
CIC - 151128

Contractor's Name and Address - Nom et l'adresse de l'entrepreneur Lumina IT Peter Van Dijk, Director 57 Auriga Drive, S104, Ottawa Ontario, K2E 8B2	Task Authorization (TA) No. - N° de l'autorisation de tâche (AT) 7113279
	Title of the task, if applicable - Titre de la tâche, s'il y a lieu DSB Change Management Consultants, L2&L3
	Total Estimated Cost of Task (Applicable taxes extra) Coût total estimatif de la tâche (Taxes applicables en sus) \$ 1,167,662.40
Security Requirements: This task includes security requirements Exigences relatives à la sécurité : Cette tâche comprend des exigences relatives à la sécurité <input type="checkbox"/> No - Non <input checked="" type="checkbox"/> Yes - Oui If YES, refer to the Security Requirements Checklist (SRCL) included in the Contract Si OUI, voir la Liste de vérification des exigences relative à la sécurité (LVERS) dans le contrat ▶	

For Revision only - Aux fins de révision seulement

TA Revision Number, if applicable Numéro de révision de l'AT, s'il y a lieu AMD 003	Total Estimated Cost of Task (Applicable taxes extra) before the revision Coût total estimatif de la tâche (Taxes applicables en sus) avant la révision \$ 1,167,662.40	Increase or Decrease (Applicable taxes extra), as applicable Augmentation ou réduction (Taxes applicables en sus), s'il y a lieu \$ 583,831.20
---	---	--

Start of the Work for a TA : Work cannot commence until a TA has been authorized in accordance with the conditions of the contract.

Début des travaux pour l'AT : Les travaux ne peuvent pas commencer avant que l'AT soit autorisée conformément au contrat.

1. Required Work: - Travaux requis :

A.Task Description of the Work required - Description de tâche des travaux requis Please refer to attached "SOW Summary" document Start/end date: starts the date the TA was issued and ends the date the contract ends (July 5 2022) The purpose of amd 003 is to add days to each of the resources for a total of days each.	See Attached - Ci-joint <input checked="" type="checkbox"/>
B. Basis of Payment - Base de paiement Payment as per diem rates in contract.	See Attached - Ci-joint <input checked="" type="checkbox"/>
C. Cost of Task - Coût de la tâche Resource: - Change Management Consultant - Senio ; Resource: - Change Management Consultant - Intermediate ; Total: \$1,167,662.40 (w/o tax) X Quebec tax 14.975% = \$1,342,519.84 total with taxes	See Attached - Ci-joint <input type="checkbox"/>
D. Method of Payment - Méthode de paiement Method of payment as per contract. Invoices to be sent to: IRCC.FINInvoices-FacturesFIN.IRCC@cic.gc.ca	See Attached - Ci-joint <input type="checkbox"/>

**Annex
Annexe**

Contract Number - Numéro du contrat
CIC - 151128

2. Authorization(s) - Autorisation(s)

By signing this TA, the authorized client and (or) the PWGSC Contracting Authority certify(ies) that the content of this TA is in accordance with the conditions of the contract.

The client's authorization limit is identified in the contract. When the value of a TA and its revisions is in excess of this limit, the TA must be forwarded to the PWGSC Contracting Authority for authorization.

En apposant sa signature sur l'AT, le client autorisé et (ou) l'autorité contractante de TPSGC atteste(nt) que le contenu de cette AT respecte les conditions du contrat.

La limite d'autorisation du client est précisée dans le contrat. Lorsque la valeur de l'AT et ses révisions dépasse cette limite, l'AT doit être transmise à l'autorité contractante de TPSGC pour autorisation.

Rahul Badami, Director Office of the ADM, Transformation and Digital Solutions

Name and title of authorized client - Nom et titre du client autorisé à signer

Signature

Date

Jessica Strangemore, Manager

PWGSC Contracting Authority - Autorité contractante de TPSGC

Strangemore, Jessica

Digitally signed by Strangemore, Jessica
Date: 2021.06.23 09:53:47 -04'00'

Signature

Date

3. Contractor's Signature - Signature de l'entrepreneur

Name and title of individual authorized - to sign for the Contractor
Nom et titre de la personne autorisée à signer au nom de l'entrepreneur

Signature

Date

Task Authorization Autorisation de tâche

Instruction for completing the form PWGSC - TPSGC 572 - Task Authorization
(Use form DND 626 for contracts for the Department of National Defence)

Contract Number

Enter the PWGSC contract number.

Contractor's Name and Address

Enter the applicable information

Security Requirements

Enter the applicable requirements

Total estimated cost of Task (Applicable taxes extra)

Enter the amount

Instruction pour compléter le formulaire PWGSC - TPSGC 572 - Autorisation de tâche
(Utiliser le formulaire DND 626 pour les contrats pour le ministère de la Défense)

Numéro du contrat

Inscrire le numéro du contrat de TPSGC.

Nom et adresse de l'entrepreneur

Inscrire les informations pertinentes

Exigences relatives à la sécurité

Inscrire les exigences pertinentes

Coût total estimatif de la tâche (Taxes applicables en sus)

Inscrire le montant

For revision only

Aux fins de révision seulement

TA Revision Number

Enter the revision number to the task, if applicable.

Total Estimated Cost of Task (Applicable taxes extra) before the revision

Enter the amount of the task indicated in the authorized TA or, if the task was previously revised, in the last TA revision.

Increase or Decrease (Applicable taxes extra), as applicable

As applicable, enter the amount of the increase or decrease to the Total Estimated Cost of Task (Applicable taxes extra) before the revision.

Numéro de la révision de l'AT

Inscrire le numéro de révision de la tâche, s'il y a lieu.

Coût total estimatif de la tâche (Taxes applicables en sus) avant la révision

Inscrire le montant de la tâche indiquée dans l'AT autorisée ou, si la tâche a été révisée précédemment, dans la dernière révision de l'AT.

Augmentation ou réduction (Taxes applicables en sus), s'il y a lieu

S'il y a lieu, inscrire le montant de l'augmentation ou de la réduction du Coût total estimatif de la tâche (Taxes applicables en sus) avant la révision.

1. Required Work: Complete sections A, B, C, and D, as required.

1. Travaux requis : Remplir les sections A, B, C et D, au besoin.

A. Task Description of the Work required:

Complete the following paragraphs, if applicable.
 Paragraph (a) applies only if there is a revision to an authorized task.

(a) Reason for revision of TA, if applicable:
 Include the reason for the revision; i.e. revised activities; delivery/completion dates; revised costs. Revisions to TAs must be in accordance with the conditions of the contract. See Supply Manual 3.35.1.50 or paragraph 6 of the Guide to Preparing and Administering Task Authorizations.

(b) Details of the activities to be performed (include as an attachment, if applicable)

(c) Description of the deliverables to be submitted (include as an attachment, if applicable).

(d) Completion dates for the major activities and/or submission dates for the deliverables (include as an attachment, if applicable).

A. Description de tâche des travaux requis :

Remplir les alinéas suivants, s'il y a lieu : L'alinéa (a) s'applique seulement s'il y a une révision à une tâche autorisée.

(a) Motif de la révision de l'AT, s'il y a lieu : Inclure le motif de la révision c.-à.-d., les activités révisées, les dates de livraison ou d'achèvement, les coûts révisés. Les révisions apportées aux AT doivent respecter les conditions du contrat. Voir l'article 3.35.1.50 du Guide des approvisionnements ou l'alinéa 6 du Guide sur la préparation et l'administration des autorisations de tâches.

(b) Détails des activités à exécuter (joindre comme annexe, s'il y a lieu).

(c) Description des produits à livrer (joindre comme annexe, s'il y a lieu).

(d) Les dates d'achèvement des activités principales et (ou) les dates de livraison des produits (joindre comme annexe, s'il y a lieu).

B. Basis of Payment:

Insert the basis of payment or bases of payment that form part of the contract that are applicable to the task description of the work; e.g. firm lot price, limitation of expenditure, firm unit price

C. Cost of Task:**Insert Option 1 or 2:****Option 1:**

Total estimated cost of Task (Applicable taxes extra): Insert the applicable cost elements for the task determined in accordance with the contract basis of payment; e.g. Labour categories and rates, level of effort, Travel and living expenses, and other direct costs.

Option 2:

Total cost of Task (Applicable taxes extra): Insert the firm unit price in accordance with the contract basis of payment and the total estimated cost of the task.

D. Method of Payment

Insert the method(s) of payment determined in accordance with the contract that are applicable to the task; i.e. single payment, multiple payments, progress payments or milestone payments. For milestone payments, include a schedule of milestones.

B. Base de paiement :

Insérer la base ou les bases de paiement qui font partie du contrat qui sont applicables à la description du travail à exécuter : p. ex., prix de lot ferme, limitation des dépenses et prix unitaire ferme.

C. Coût de la tâche :**Insérer l'option 1 ou 2****Option 1 :**

Coût total estimatif de la tâche (Taxes applicables en sus) Insérer les éléments applicables du coût de la tâche établies conformément à la base de paiement du contrat. p. ex., les catégories de main d'œuvre, le niveau d'effort, les frais de déplacement et de séjour et autres coûts directs.

Option 2 :

Coût total de la tâche (Taxes applicables en sus) : Insérer le prix unitaire ferme conformément à la base de paiement du contrat et le coût estimatif de la tâche.

D. Méthode de paiement

Insérer la ou les méthode(s) de paiement établit conformément au contrat et qui sont applicable(s) à la tâche; c.-à.-d., paiement unique, paiements multiples, paiements progressifs ou paiements d'étape. Pour ces derniers, joindre un calendrier des étapes.

2. Authorization(s):

The client and/or PWGSC must authorize the task by signing the Task Authorization in accordance with the conditions of the contract. The applicable signatures and the date of the signatures is subject to the TA limits set in the contract. When the estimate of cost exceeds the client Task Authorization's limits, the task must be referred to PWGSC.

3. Contractor's Signature

The individual authorized to sign on behalf of the Contractor must sign and date the TA authorized by the client and/or PWGSC and provide the signed original and a copy as detailed in the contract.

2. Autorisation(s) :

Le client et (ou) TPSGC doivent autoriser la tâche en signant l'autorisation de tâche conformément aux conditions du contrat. Les signatures et la date des signatures appropriées sont assujetties aux limites d'autorisation de tâche établies dans le contrat. Lorsque l'estimation du coût dépasse les limites d'autorisation de tâches du client, la tâche doit être renvoyée à TPSGC.

3. Signature de l'entrepreneur

La personne autorisée à signer au nom de l'entrepreneur doit signer et dater l'AT, autorisée par le client et (ou) TPSGC et soumettre l'original signé de l'autorisation et une copie tel que décrit au contrat.



Public Works and Government
Services Canada

Travaux publics et Services
gouvernementaux Canada

s.20(1)(b)

Annex
Annexe

Task Authorization Autorisation de tâche

s.19(1)

Contract Number - Numéro du contrat
CIC - 151128

Contractor's Name and Address - Nom et l'adresse de l'entrepreneur Lumina IT Peter Van Dijk, Director 57 Auriqa Drive, S104, Ottawa Ontario, K2E 8B2	Task Authorization (TA) No. - N° de l'autorisation de tâche (AT) 7113279
	Title of the task, if applicable - Titre de la tâche, s'il y a lieu DSB Change Management Consultants, L2&L3
	Total Estimated Cost of Task (Applicable taxes extra) Coût total estimatif de la tâche (Taxes applicables en sus) \$788,364.23
Security Requirements: This task includes security requirements Exigences relatives à la sécurité : Cette tâche comprend des exigences relatives à la sécurité <input type="checkbox"/> No - Non <input checked="" type="checkbox"/> Yes - Oui If YES, refer to the Security Requirements Checklist (SRCL) included in the Contract Si OUI, voir la Liste de vérification des exigences relative à la sécurité (LVERS) dans le contrat ►	

For Revision only - Aux fins de révision seulement

TA Revision Number, if applicable Numéro de révision de l'AT, s'il y a lieu AMD 004	Total Estimated Cost of Task (Applicable taxes extra) before the revision Coût total estimatif de la tâche (Taxes applicables en sus) avant la révision \$ 1,167,662.40	Increase or Decrease (Applicable taxes extra), as applicable Augmentation ou réduction (Taxes applicables en sus), s'il y a lieu - \$379,298.17
--	--	--

Start of the Work for a TA : Work cannot commence until a TA has been authorized in accordance with the conditions of the contract.

Début des travaux pour l'AT : Les travaux ne peuvent pas commencer avant que l'AT soit autorisée conformément au contrat.

1. Required Work: - Travaux requis :

A.Task Description of the Work required - Description de tâche des travaux requis Please refer to attached "SOW Summary" document Start/end date: starts the date the TA was issued and ends the date the contract ends (July 5 2022) The purpose of amd 004 is to subtract days from		See Attached - Ci-joint <input checked="" type="checkbox"/>
B. Basis of Payment - Base de paiement Payment as per diem rates in contract.		See Attached - Ci-joint <input checked="" type="checkbox"/>
C. Cost of Task - Coût de la tâche Resource - Change Management Consultant - Senior Resource - Change Management Consultant - Intermediate Total: \$788,364.23 (w/o tax) X Quebec tax 14.975% = \$906,421.77 total with taxes		See Attached - Ci-joint <input type="checkbox"/>
D. Method of Payment - Méthode de paiement Method of payment as per contract. Invoices to be sent to: IRCC.FINInvoices-FacturesFIN.IRCC@cic.gc.ca		See Attached - Ci-joint <input type="checkbox"/>

s.19(1)

**Annex
Annexe**

Contract Number - Numéro du contrat
CIC - 151128

2. Authorization(s) - Autorisation(s)

By signing this TA, the authorized client and (or) the PWGSC Contracting Authority certify(ies) that the content of this TA is in accordance with the conditions of the contract.

The client's authorization limit is identified in the contract. When the value of a TA and its revisions is in excess of this limit, the TA must be forwarded to the PWGSC Contracting Authority for authorization.

En apposant sa signature sur l'AT, le client autorisé et (ou) l'autorité contractante de TPSGC atteste(nt) que le contenu de cette AT respecte les conditions du contrat.

La limite d'autorisation du client est précisée dans le contrat. Lorsque la valeur de l'AT et ses révisions dépasse cette limite, l'AT doit être transmise à l'autorité contractante de TPSGC pour autorisation.

~~Leina Keighan, A/Director, Digital Platform Modernization~~

Name and title of authorized client - Nom et titre du client autorisé à signer

VioletteFehr, Nancy

Signature

Digitally signed by VioletteFehr, Nancy

Date: 2021.12.15 22:57:43 -05'00'

Date

~~Jessica Strangemore, Manager~~

~~PWGSC Contracting Authority - Autorité contractante de TPSGC~~

Dubeau, Joanne

Signature

Digitally signed by Dubeau, Joanne

Date: 2021.12.16 22:39:18 -05'00'

Date

3. Contractor's Signature - Signature de l'entrepreneur

Peter Van Dijk, Director Lumina IT INC

Name and title of individual authorized - to sign for the Contractor
Nom et titre de la personne autorisée à signer au nom de l'entrepreneur

Signature

December 14, 2021

Date

TASK AUTHORIZATION (TA) FORM			
Contractor:	Veritaaq Technology House Inc.	Contract Number:	B8986-170400/001/ZM
Commitment Number (PR#):	152195	Financial Coding:	Resource 1: 84646762-1001078-0640-54080 Resource 2: 84646836-1001081-5560-54080 Resource 3: 84646762-1001015-5560-54080 Resource 4: 84646995-1000989-5563-54080 Resource 5: 84646762-1001078-0640-54080 Resource 6: 84646762-1001051-0140-54080 Resource 7: 84646762-1001015-5560-54080
Task Number:	7113246	Amendment Number:	001
Issue Date:	June 21, 2021	Response required by:	June 23, 2021
1. STATEMENT OF WORK (WORK ACTIVITIES, CERTIFICATIONS AND DELIVERABLES)			
<p>Amendment 001 is raised to reduce the level of effort by days</p> <p>Manager: Ariane Richard</p> <p>Category: ERP Functional Analyst – Siebel Level 3 – resources</p> <p>Description of the Project / Work Required:</p> <p>The Contractor's resource to provide professional services in support of the maintenance of the Global Case Management (GCMS) System interfaces. This Task Authorization covers the effort expected to be provided for the following initiatives:</p> <p>Release 24 is expected to be implemented in Production in October 2020, followed by minor and emergency releases to ensure application solution stability and performance. The release content is not fully determined, however some of the release deliverables are implementing PPMI Passport Program Modernization - Intake Tool Project, Asylum Modernization, Online functionality Enhancements, Portal</p>			

Review, Architecture Improvement/Innovation, GCMS functionality enhancements, International Experience Canada enhancements, IEC Enhancements, CIT Improvements, TR eApp, TFS Source Code Cleanup, C2C changes to streamline visitor applications, Express Entry Enhancements, Enhancement to eTA functionality, Usability Enhancement and System Optimization.

Release 25 is expected to be implemented in Production in **February 2021**, followed by minor and emergency releases to ensure application solution stability and performance. Content to be determined.

Release 26 is expected to be implemented in Production in **June 2021**, followed by minor and emergency releases to ensure application solution stability and performance. Content to be determined.

Release 27 is expected to be implemented in Production in **October 2021**, followed by minor and emergency releases to ensure application solution stability and performance. Content to be determined.

Tasks:

1. Produce Siebel graphical user interface (GUI), Adobe form, Real-time/Near Real-time/Bulk load Interface, and Web solution System Use Cases and Functional Designs in relation to assigned change requests/bugs based on input from business architecture, system development & system architecture.
 - a. Using existing repository designs, come up with a workable Siebel GUI, Adobe form, Real-time/Near Real-time/Bulk load Interface, and Web solution functional design based on input from all stakeholders.
 - b. Use Oracle Business Intelligence software integrated with Sparx Enterprise Architecture to determine impacts of changes to existing designs.
 - c. Organize and lead elaboration discussions around specific change requests.
 - d. Produce and maintain System Use Case Diagrams to support Business Processes and any changes required to them.
 - e. Coordinate mock up changes as a result of elaboration discussions.
 - f. Identify and outline all work required by downstream groups in order to implement the necessary changes.
 - g. Produce elaboration session workbooks for loading into requirements/design repository.
 - h. Lead design reviews with all stakeholders.
2. Respond to any functional design questions from any/all stakeholders.
3. Identify, coordinate, and create internal team design change requests as a result of any errors made.
4. Participate and provide input in process improvement initiatives related to the portfolio's "Application Lifecycle Model".

The following deliverables are required:

1. Develop and produce documentation for system solution design specifications;
2. Provide weekly Status report to the management team and technical authority identifying accomplishments during the reporting period, outstanding issues and planned activities for next time period; status reporting will be through a variety of media, including but not limited, to MS Word, MS Outlook, Visual Studio Team Foundation Server task item and weekly project status meeting;
3. Provide all source code associated with the above work activities.

s.19(1)

s.20(1)(b)

2. PERIOD OF SERVICES		FROM (DATE): July 20, 2020	TO (DATE): July 19, 2021	
3. Work Location:		300 Slater Street, Ottawa, ON K1A 1L1		
4. Invoice sent to:		Via email to: IRCC.ITopsFinanceAdmin-AgentsFinancierOpsTI.IRCC@cic.gc.ca		
5. Travel Requirements:		None		
6. Language Requirements:		English Essential		
7. Other Conditions / Constraints:		Work may be required outside normal working hours.		
8. Level of Security Clearance Required for the Contractor Personnel:		Reliability		
9. Contractor's Response:				
Category and Name of Proposed Resource	PWGSC Security File Number	Firm Per Diem Rate	Estimated # of Days	Total cost
ERP Functional Analyst – Siebel Level 3 (Resource 1)				
ERP Functional Analyst – Siebel Level 3 (Resource 2)				
ERP Functional Analyst – Siebel Level 3 (Resource 3)				
ERP Functional Analyst – Siebel Level 3 (Resource 4)				
ERP Functional Analyst – Siebel Level 3 (Resource 5)				
ERP Functional Analyst – Siebel Level 3 (Resource 6)				

ERP Functional Analyst – Siebel Level 3 (Resource 7)				
AMENDMENT 001				
ERP Functional Analyst – Siebel Level 3 (Resource 1)				
	Estimated Cost (A):			\$1,416,213.75
	Applicable Taxes (B):			\$212,078.01
	Total Labour Cost (C= A + B):			\$1,628,291.76
	Total Travel & Living Cost (D):			n/a
	Maximum TA Price (E = C + D):			\$1,628,291.76
Please note that consultants must not exceed the maximum number of days allocated in the TA.				
10. Contractor's Signature				
Name, Title and Signature of Individual Authorized to Sign on Behalf of Contractor		Signature: <u>Shayna Haven (Jul 6, 2021 10:23 EDT)</u>		
Director of Operations		Date: <u>Jul 6, 2021</u>		
(type or print)				
11. Approval – Signing Authority				
Signatures (Client)				
Name, Title and Signature of Technical Authority to Sign on Behalf of		Signature: <u>Roy, Alain</u> Digitally signed by Roy, Alain		
Martin Legault, A/Director, Product Delivery Passport and Citizenship, IT DevOps		Date: <u>2021.07.06 13:20:27 -04'00'</u>		
Name, Title and Signature of CIC Procurement Representative to Sign on Behalf of CIC		Signature: <u>Lafontaine, Micheline</u> Signature numérique de Lafontaine, Micheline		
Micheline Lafontaine		Date: <u>2021.07.07 07:44:48 -04'00'</u>		
(type or print)				
Signatures (PWGSC)				
Name, Title and Signature of *Contracting Authority to Sign on Behalf of Public Works and Government Services Canada		Signature: <u>Gail Cook</u> Digitally signed by: Cook, Gail		
(type or print)		Date: <u>2021.07.07 08:18:37 -04'00'</u>		
You are requested to sell to her Majesty the Queen in Right of Canada, in accordance with the terms and conditions set out herein, referred to herein, or attached hereto, the services listed herein and in any attached sheets at the price set out there of.				

s.19(1)

s.20(1)(b)

7113246 - PR 152195 - NEW TA - ERP Functional Analyst Siebel Level 3_Ve...

Final Audit Report

2021-07-06

Created: 2021-07-06

By:

Status: Signed


Transaction ID:


"7113246 - PR 152195 - NEW TA - ERP Functional Analyst Siebel Level 3_Ve..." History

 Document created by

 Document emailed to for signature

 Email viewed by

 Document e-signed by :

 Agreement completed.
2021-07-06 - 2:28:28 PM GMT

s.20(1)(b)

TASK AUTHORIZATION (TA) FORM			
Contractor:	Veritaaq Technology House Inc.	Contract Number:	B8986-170400/001/ZM
Commitment Number (PR#):	152195	Financial Coding: Resource 1: Vote 1 - TR-eApp Resource 2: Vote 5 – Asylum Resource 3: Vote 5 - Through Web Usability and Cmms Resource 4: Passport Revolving Fund - ePPT Next Generation Resource 5: Vote 1 - TR-eApp Resource 6: Vote 1 - MYLP Resource 7: Vote 5 - Through Web Usability and Cmms	Resource 1: 84646762-1001078-0640-54080 Resource 2: 84646836-1001081-5560-54080 Resource 3: 84646762-1001015-5560-54080 Resource 4: 84646995-1000989-5563-54080 Resource 5: 84646762-1001078-0640-54080 Resource 6: 84646762-1001051-0140-54080 Resource 7: 84646762-1001015-5560-54080
Task Number:	7113246	Amendment Number:	002
Issue Date:	Sep. 13, 2021	Response required by:	Sep. 15, 2021
1. STATEMENT OF WORK (WORK ACTIVITIES, CERTIFICATIONS AND DELIVERABLES)			
<p>Amendment 002 is raised to close TA.</p> <p>Amendment 001 is raised to reduce the level of effort by _____ days</p> <p>Manager: Ariane Richard</p> <p>Category: ERP Functional Analyst – Siebel Level 3 - Resources</p> <p>Description of the Project / Work Required:</p> <p>The Contractor's resource to provide professional services in support of the maintenance of the Global Case Management (GCMS) System interfaces. This Task Authorization covers the effort expected to be provided for the following initiatives:</p>			

Release 24 is expected to be implemented in Production in **October 2020**, followed by minor and emergency releases to ensure application solution stability and performance. The release content is not fully determined, however some of the release deliverables are implementing PPMI Passport Program Modernization - Intake Tool Project, Asylum Modernization, Online functionality Enhancements, Portal Review, Architecture Improvement/Innovation, GCMS functionality enhancements, International Experience Canada enhancements, IEC Enhancements, CIT Improvements, TR eApp, TFS Source Code Cleanup, C2C changes to streamline visitor applications, Express Entry Enhancements, Enhancement to eTA functionality, Usability Enhancement and System Optimization.

Release 25 is expected to be implemented in Production in **February 2021**, followed by minor and emergency releases to ensure application solution stability and performance. Content to be determined.

Release 26 is expected to be implemented in Production in **June 2021**, followed by minor and emergency releases to ensure application solution stability and performance. Content to be determined.

Release 27 is expected to be implemented in Production in **October 2021**, followed by minor and emergency releases to ensure application solution stability and performance. Content to be determined.

Tasks:

1. Produce Siebel graphical user interface (GUI), Adobe form, Real-time/Near Real-time/Bulk load Interface, and Web solution System Use Cases and Functional Designs in relation to assigned change requests/bugs based on input from business architecture, system development & system architecture.
 - a. Using existing repository designs, come up with a workable Siebel GUI, Adobe form, Real-time/Near Real-time/Bulk load Interface, and Web solution functional design based on input from all stakeholders.
 - b. Use Oracle Business Intelligence software integrated with Sparx Enterprise Architecture to determine impacts of changes to existing designs.
 - c. Organize and lead elaboration discussions around specific change requests.
 - d. Produce and maintain System Use Case Diagrams to support Business Processes and any changes required to them.
 - e. Coordinate mock up changes as a result of elaboration discussions.
 - f. Identify and outline all work required by downstream groups in order to implement the necessary changes.
 - g. Produce elaboration session workbooks for loading into requirements/design repository.
 - h. Lead design reviews with all stakeholders.
2. Respond to any functional design questions from any/all stakeholders.
3. Identify, coordinate, and create internal team design change requests as a result of any errors made.
4. Participate and provide input in process improvement initiatives related to the portfolio's "Application Lifecycle Model".

The following deliverables are required:

1. Develop and produce documentation for system solution design specifications;
2. Provide weekly Status report to the management team and technical authority identifying accomplishments during the reporting period, outstanding issues and planned activities for next time period; status reporting will be through a variety of

media, including but not limited, to MS Word, MS Outlook, Visual Studio Team Foundation Server task item and weekly project status meeting; 3. Provide all source code associated with the above work activities.				
2. PERIOD OF SERVICES		FROM (DATE): July 20, 2020	TO (DATE): July 19, 2021	
3. Work Location:		300 Slater Street, Ottawa, ON K1A 1L1		
4. Invoice sent to:		Via email to: IRCC.ITopsFinanceAdmin-AgentsFinancierOpsTI.IRCC@cic.gc.ca		
5. Travel Requirements:		None		
6. Language Requirements:		English Essential		
7. Other Conditions / Constraints:		Work may be required outside normal working hours.		
8. Level of Security Clearance Required for the Contractor Personnel:		Reliability		
9. Contractor's Response:				
Category and Name of Proposed Resource	PWGSC Security File Number	Firm Per Diem Rate	Estimated # of Days	Total cost
ERP Functional Analyst – Siebel Level 3 (Resource 1)				
ERP Functional Analyst – Siebel Level 3 (Resource 2)				
ERP Functional Analyst – Siebel Level 3 (Resource 3)				
ERP Functional Analyst – Siebel Level 3 (Resource 4)				
ERP Functional Analyst – Siebel Level 3 (Resource 5)				
ERP Functional Analyst – Siebel Level 3 (Resource 6)				

s.19(1)

s.20(1)(b)

ERP Functional Analyst – Siebel Level 3 (Resource 7)				
<u>AMENDMENT 001</u>				
ERP Functional Analyst – Siebel Level 3 (Resource 1)				
<u>AMENDMENT 002</u>				
ERP Functional Analyst – Siebel Level 3				
Resource 2 – 17.27 -				
Resource 4 – 53.07				
Resource 7 – 29.89				
ERP Functional Analyst – Siebel Level 3 (Resource 3)				
ERP Functional Analyst – Siebel Level 3 (Resource 6)				
	Estimated Cost (A):			\$1,333,762.50
	Applicable Taxes (B):			\$199,730.93
	Total Labour Cost (C= A + B):			\$1,533,493.43
	Total Travel & Living Cost (D):			n/a
	Maximum TA Price (E = C + D):			\$1,533,493.43
Please note that consultants must not exceed the maximum number of days allocated in the TA.				
10. Contractor's Signature				
Name, Title and Signature of Individual Authorized to Sign on Behalf of Contractor <div style="text-align: center;">Director of Operations</div> (type or print)		Signature: _____ <small>Nov 18, 2021 10:52 EST</small> Date: Nov 18, 2021		

11. Approval – Signing Authority	
Signatures (Client)	
Name, Title and Signature of Technical Authority to Sign on Behalf of Martin Legault, A/Director, Product Delivery Passport and Citizenship, IT DevOps	Digitally signed by Roy, Alain Signature: <u>Roy, Alain</u> Date: _____ Date: 2021.11.18 12:02:03 -05'00'
Name, Title and Signature of CIC Procurement Representative to Sign on Behalf of CIC Micheline Lafontaine (type or print)	Signature: <u>Lafontaine, Micheline</u> Date: _____ Signature numérique de Lafontaine, Micheline Date : 2021.11.18 12:49:14 -05'00'
Signatures (PWGSC)	
Name, Title and Signature of *Contracting Authority to Sign on Behalf of Public Works and Government Services Canada (type or print)	Digitally signed by Mullen, Aliria Signature: <u>Mullen, Aliria</u> Date: _____ Date: 2021.12.23 07:22:34 -05'00'
You are requested to sell to her Majesty the Queen in Right of Canada, in accordance with the terms and conditions set out herein, referred to herein, or attached hereto, the services listed herein and in any attached sheets at the price set out there of.	

s.19(1)

AMD-002 7113246 - PR 152195 - CLOSE-OUT v.2

Final Audit Report

2021-11-18


Created: 2021-11-18

By:

Status: Signed


Transaction ID:


"AMD-002 7113246 - PR 152195 - CLOSE-OUT v.2" History

 Document created by ,

 Document emailed to for signature

 Email viewed by

 Document e-signed by

 Agreement completed.
2021-11-18 - 3:52:46 PM GMT

Contact info 7113246

Technical Authority :

Alain Roy

Alain.roy@cic.gc.ca

Thaine.Marcia

From: Roy.Alain
Sent: March 16, 2022 9:09 AM
To: Thaine.Marcia
Subject: FW: URGENT**FOR SIGNATURE**Invoices

Found this email for ATIP A-2021-37057 / BM

Veritaaq Technology House/Experis - Total Value: \$1,628,291.76. Contract Date: Jul. 16, 2020. Original Value: \$1,690,132.50. Amendment Value:-\$61,840.74. (<https://search.open.canada.ca/en/ct/id/cic,C-2021-2022-Q2-00033>)

Alain Roy

Director, IT DevOps, Citizenship and Passport, IT Operations
Immigration, Refugees and Citizenship Canada / Government of Canada
Alain.Roy@cic.gc.ca / Tel: 343-999-5207

Directeur, DevOps TI, Passeport et Citoyenneté, Opérations de TI
Immigration, Réfugiés et Citoyenneté Canada / Gouvernement du Canada
Alain.Roy@cic.gc.ca / Tél.: 343-999-5207

From: Hann.Chris <Chris.Hann@cic.gc.ca>
Sent: Monday, May 17, 2021 8:09 AM
To: Roy.Alain <Alain.Roy@cic.gc.ca>; Tremblay.Karine <Karine.Tremblay@cic.gc.ca>
Subject: RE: URGENT**FOR SIGNATURE**Invoices

Good morning,

Just to clarify, the "FIN Invoice" process is new – but the way it's saved and sent to Delegated Authorities for signature has not changed.

Everything has always be sent via GCDOCs link so it doesn't use up all your Inbox storage space. If something was sent as an attachment, it was by mistake or simply because it was 1 item.

Regards,

Chris Hann

Team Leader, ASU IT Service Operations, IT Operations
Immigration, Refugees and Citizenship Canada / Government of Canada
Chris.Hann@cic.gc.ca / Tel: 613-437-6887

, Opérations de TI
Immigration, Réfugiés et Citoyenneté Canada / Gouvernement du Canada
Chris.Hann@cic.gc.ca / Tél.: 613-437-6887

From: Roy.Alain <Alain.Roy@cic.gc.ca>
Sent: May 17, 2021 8:03 AM
To: Tremblay.Karine <Karine.Tremblay@cic.gc.ca>

Cc: Hann.Chris <Chris.Hann@cic.gc.ca>

Subject: RE: URGENT**FOR SIGNATURE**Invoices

Vraiment pas le choix – ça va couter cher à la longue. Qui a mis cela en place sans consultations? Je voudrais leur parler pour voir.

Merci,

Alain Roy

Director, IT DevOps, Citizenship and Passport, IT Operations
Immigration, Refugees and Citizenship Canada / Government of Canada
Alain.Roy@cic.gc.ca / Tel: 343-999-5207

Directeur, DevOps TI, Passeport et Citoyenneté, Opérations de TI
Immigration, Réfugiés et Citoyenneté Canada / Gouvernement du Canada
Alain.Roy@cic.gc.ca / Tél.: 343-999-5207

From: Tremblay.Karine <Karine.Tremblay@cic.gc.ca>

Sent: Monday, May 17, 2021 8:02 AM

To: Roy.Alain <Alain.Roy@cic.gc.ca>

Cc: Hann.Chris <Chris.Hann@cic.gc.ca>

Subject: RE: URGENT**FOR SIGNATURE**Invoices

Allo Alain,

C'est le nouveau processus que finance a mit en place pour tout le département. C'est plus compliqué pour moi aussi de faire le suivi mais bon...on n'a pas le choix de se conformer.

😊

Karine Tremblay

Financial Officer, IT Operations
Immigration, Refugees and Citizenship Canada / Government of Canada
Karine.Tremblay@cic.gc.ca / Remote working

Agente financière, Opérations de TI
Immigration, Réfugiés et Citoyenneté Canada / Gouvernement du Canada
Karine.Tremblay@cic.gc.ca / Travail à distance

From: Roy.Alain <Alain.Roy@cic.gc.ca>

Sent: Monday, May 17, 2021 8:00 AM

To: Tremblay.Karine <Karine.Tremblay@cic.gc.ca>

Cc: Hann.Chris <Chris.Hann@cic.gc.ca>

Subject: RE: URGENT**FOR SIGNATURE**Invoices

Done – any reason we no longer extract the PDF and put them in attachments. It takes me three times longer for each invoice to sign with a lot of extra click, deleting email before, etc...

Thanks,

Alain Roy

Director, IT DevOps, Citizenship and Passport, IT Operations
 Immigration, Refugees and Citizenship Canada / Government of Canada
Alain.Roy@cic.gc.ca / Tel: 343-999-5207

Directeur, DevOps TI, Passeport et Citoyenneté, Opérations de TI
 Immigration, Réfugiés et Citoyenneté Canada / Gouvernement du Canada
Alain.Roy@cic.gc.ca / Tél.: 343-999-5207

From: Tremblay.Karine <Karine.Tremblay@cic.gc.ca>

Sent: Friday, May 14, 2021 3:45 PM

To: Roy.Alain <Alain.Roy@cic.gc.ca>

Cc: Hann.Chris <Chris.Hann@cic.gc.ca>

Subject: URGENT**FOR SIGNATURE**Invoices

Bonjour Alain,

Ces factures seraient à signer le plus rapidement possible, il nous reste un jour ouvrable pour les traiter.

REQ000000098875	8464	7113245	
-----------------	------	---------	--

REQ000000099597	8464	7113246	
-----------------	------	---------	--

REQ000000099204	8464	7113245	
-----------------	------	---------	--

REQ000000100683	8464	7113236	
-----------------	------	---------	--

Karine Tremblay

Financial Officer, IT Operations
 Immigration, Refugees and Citizenship Canada / Government of Canada
Karine.Tremblay@cic.gc.ca / Remote working

Agente financière, Opérations de TI
 Immigration, Réfugiés et Citoyenneté Canada / Gouvernement du Canada
Karine.Tremblay@cic.gc.ca / Travail à distance

Merci,

